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**HISTORICAL ACTIVITIES**

**MILITARY HISTORY  
RESPONSIBILITIES,  
POLICIES AND PROCEDURES**

**Effective 15 August 1971**

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**HEADQUARTERS, DEPARTMENT OF THE ARMY**

**JUNE 1971**

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No. 870-5 }

HEADQUARTERS  
DEPARTMENT OF THE ARMY  
WASHINGTON, DC, 18 June 1971

## HISTORICAL ACTIVITIES

# MILITARY HISTORY: RESPONSIBILITIES, POLICIES, AND PROCEDURES

*Effective 15 August 1971*

*This revision of AR 870-5, incorporates, so far as is practicable and feasible, the individual recommendations of the Department of the Army Staff and the major commands of the Army to improve the conduct of historical activities Armywide. A new policy is announced with respect to the preparation of unit histories and annual supplements. The policy now is to urge commanders to have unit histories and annual supplements prepared where formerly this was a requirement. This revision also describes the background, responsibilities, mission, and functions of the US Army Military History Research Collection, Carlisle Barracks, Pennsylvania, a class II activity of the Office of the Chief of Military History. Limited supplementation is permitted to refine procedures at local levels. However, such implementation will retain the intent of this regulation and will be held to a minimum. All supplements will retain the basic number of this regulation.*

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## CHAPTER 1

### GENERAL

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**1-1. Purpose and scope.** This regulation sets forth the general responsibilities, policies, and procedures concerned with the preparation and use of military history, and the specific objectives, policies, and responsibilities for the planning and conduct of the Army Historical Program and associated command historical programs. This regulation assigns responsibilities and establishes procedures for conducting historical operations by all commands, activities, and installations of the active Army, including oversea Army component commands, US Army Reserve, and the Army National Guard when in active Federal service.

**1-2. Explanation of terms.** *a.* "Military history" is an objective, accurate, descriptive, and interpretive record of all activities of the Armed Forces in peace and war. From its study, lessons relevant to current and future situations may be drawn.

*b.* The "Army Historical Program" is the scheme of administrative action devised for attaining, through the preparation and use of military history, specified objectives of the Department of the Army.

*c.* A "Command Historical Program" is that plan of all organizations subordinate to Headquarters, Department of the Army, for attaining objectives as assigned by the Army Historical Program and implementing directives, and objectives conceived by local commanders as necessary and appropriate in discharging the responsibilities assigned by this regulation.

*d.* An "Army historian" is a professionally qualified historian, either military or civilian, who occupies a position specified by a table of distribution and allowances or a table of organization for the discharge of military history responsibilities.

*e.* An "Army historical officer" is an individual, either military or civilian, who is assigned responsibilities for military history activities in addition to other duties.

*f.* A "staff historian" is either an Army historian or an Army historical officer who has been assigned staff responsibilities for military history activities on the staff of a commander.

*g.* A "staff historical office," as used in this regulation, describes any staff section established by a table of distribution and allowances or a table or organization within the headquarters of a command to assist the commander in the discharge of his military history responsibilities.

**1-3. Objectives.** *a.* To achieve within the Army a generally accepted realization that military history is a basic source of knowledge for the solution of problems and the attainment of advances in the theory and practice of military science.

*b.* To utilize military history continuously, regularly, and fully in all Army activities to achieve—

(1) Doctrine appropriate to the demands of modern war.

(2) Training and professional proficiency.

(3) The highest degree of individual and organizational morale and esprit.

*c.* To inform other elements of Government, and the American people, about the Army's past.

**1-4. Application.** This regulation applies to all commands, activities, installations, and organizations of the active Army and Army Reserve, and the National Guard when in active Federal service.



## CHAPTER 2

### AUTHORITY AND GENERAL RESPONSIBILITIES

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**2-1. General.** This chapter assigns only general responsibilities for the preparation and use of military history, and is supplemented by the chapters which follow and outline the specific responsibilities applying to designated personnel, commands, and agencies.

*a. Command responsibility.* The conduct of military history programs is a command responsibility. Discharge of this responsibility includes planning, programming, and executing military history programs and insuring compliance with regulations, historical directives, and Department of the Army policies.

*b. Staff responsibility.* The commander is assisted in the discharge of his military history responsibilities by the staff historian on his staff. The staff historian must be informed of existing and projected plans and policies of the command, and he, in turn, must keep the commander and the rest of the staff informed about the military historical responsibilities of the command, both for preparation and use of military history.

*c. Individual responsibility.*

(1) Individual leaders, commissioned and noncommissioned, are responsible for broadening their professional knowledge and skills through individual effort or participation in formalized educational programs and are encouraged to pursue the study of military history as a professionally rewarding activity.

(2) Because of the public trust placed in them, all individual military and civilian members of the Army are responsible for having a clear understanding of the basic events which have shaped the military heritage of the United States and the organizations to which they are assigned.

**2-2. Secretary of the Army.** In conducting

the affairs of the Department of the Army, the Secretary of the Army insures the successful pursuit of a historical program which meets Army requirements for military history.

**2-3. Under Secretary of the Army.** Acting for the Secretary of the Army, the Under Secretary of the Army exercises direction and supervision over all matters pertaining to the formulation, execution, and review of Army policies, plans, and programs concerning military history.

**2-4. Department of the Army Historical Advisory Committee.** The Committee, formerly known as the Historical Advisory Committee and established on 19 May 1943, consists of four military members, representing the military school system, and six civilian members appointed by the Secretary of the Army under the provisions of AR 15-1 representing the historical profession of the Nation. The following installations provide the military members of the Committee: the US Army War College, the US Army Command and General Staff College, the US Military Academy, and the US Continental Army Command. The civilian members, one of whom is the chairman, serve for 5-year terms. The Committee advises the Secretary of the Army, the Chief of Staff, and the Chief of Military History on such matters as the conformity of the Army's historical work and methods with professional standards, effective cooperation between the historical and military professions in advancing the purposes of the Army Historical Program, and the responsibility of the Chief of Military History to further the study of and interest in military history in both civilian and military schools.

**2-5. Chief of Staff.** The Chief of Staff is responsible to the Secretary of the Army for the

preparation and implementation of the Army Historical Program.

**2-6. Deputy Chief of Staff for Military Operations.** Under the direction of the Chief of Staff, the Deputy Chief of Staff for Military Operations exercises general staff supervision over the activities of the Chief of Military History, and is responsible for the preparation of an annual historical summary of the operations of his office (chap. 8).

**2-7. Chief of Military History.** Under the general staff supervision of the Deputy Chief of Staff for Military Operations, the Chief of Military History advises the Chief of Staff on historical matters; provides information on Army historical matters for the Secretary of the Army, the Chief of Staff, other members of the Army staff, subordinate Army commands, and other Government departments and agencies (including the President, the Congress, and the Secretary of Defense); formulates, executes, and reviews the Army Historical Program; coordinates and supervises all Army historical matters, including historical properties; prepares and publishes histories required by the Army; provides historical background and precedent for the development of military plans, policies, doctrine, and techniques; and provides historical material and assistance to, and maintains liaison with, public and private agencies and individuals to stimulate interest and study in the field of military history.

**2-8. Department of the Army staff agencies.** Heads of all Department of the Army staff agencies are responsible for—

*a.* Insuring that their subordinates use information on historical experience in preparing staff actions, studies, plans, and doctrines to the maximum extent such information is available and applicable (chap. 3).

*b.* Assisting The Adjutant General in the collection and retirement of Historical records and source material of US Army operations (chap. 13).

*c.* Maintaining in their offices copies of the

publications listed in Department of the Army circulars of the 870 series which are appropriate to their activities.

*d.* Preparing an annual historical summary of the operations of their offices (chap. 8).

*e.* In addition to the foregoing, The Surgeon General and the Chief of Engineers, as heads of agencies with operating responsibilities, are responsible for insuring the maximum use of military history in planning and executing the functions of their agencies for preparing historical publications and historical monographs and studies (chaps. 6 and 7).

**2-9. CONUS major Army commands.** *a.* Commanders at all echelons are responsible for:

(1) The preparation and use of military history as prescribed by this regulation and the Army Historical Program.

(2) The collection and retirement of historical records and source material of US Army operations (chap. 13).

(3) Insuring that all historical publications listed in Department of Army circulars of the 870 series which are authorized their commands (chap. 6) are made available to personnel of their commands.

(4) Encouraging all leaders, commissioned and noncommissioned, to read, study, and use the aforementioned historical publications.

*b.* The commanders of following listed commands are responsible for insuring the maximum use of military history in planning and executing the functions of their commands, for preparing historical monographs (chap. 7), and for preparing an annual historical summary of the operations of their commands (chap. 8).

(1) US Continental Army Command (includes US Army Forces STRIKE Command and US Army Forces, Atlantic).

(2) US Army Materiel Command.

(3) US Army Combat Developments Command.

(4) US Army Air Defense Command.

(5) US Army Strategic Communications Command.

(6) US Army Intelligence Command.

(7) US Army SAFEGUARD System Office.

c. The Commanding General, US Army Security Agency is responsible for insuring maximum use of military history in planning and executing the functions of his command, for the preparation of historical monographs (chap. 7), and for preparing an annual historical summary of the operations of his command (chap. 8). He is exempt from the reporting requirements of this regulation to include the submission of historical monographs and the annual historical summary. Significant historical documents, monographs, annual historical summaries, and subordinate unit historical reports will be maintained at Headquarters, US Army Security Agency and will be available for research and review to authorized personnel having a valid need-to-know and the required clearances.

**2-10. Oversea Army component commands.** a. The general responsibilities specified in paragraph 2-9a are applicable to commanders at all echelons in oversea commands.

b. The commanders of the following listed commands are responsible for preparing historical monographs (chap. 7) and for preparing an annual historical summary of the operations of their commands (chap. 8).

(1) US Army, Europe.

(2) US Army, Pacific.

(3) US Army, Alaska.

(4) US Army Forces Southern Command.

**2-11. Commanders of active theaters of operations.** Commanders of United States Army component commands of unified and combined commands engaged in combat (Vietnam) or stability type (Dominican Republic) operations will conduct field historical operations (chap. 14).



## CHAPTER 3

### USE OF MILITARY HISTORY

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**3-1. General.** A common understanding of the use to which history may be put in the solution of military problems requires a general knowledge of the value of military history, and the forms it takes.

*a.* The value of military history derives from the premise that knowledge is power, and from the nature of military history as a type of knowledge. Military history constitutes a record of past experience in dealing with military problems and situations, many of them of a recurrent or continuing nature. In some cases study of this past experience reveals lessons with direct application to current problems; in almost all cases it provides background necessary to the understanding of current problems and trends.

*b.* The forms of military history are quite diverse, ranging from the raw record to published historical narratives. The latter form possesses by far the greater utility to the average practitioner of military science. Other forms of considerable use within the Army, particularly in staff work, include unpublished monographs, historical summaries, chronologies, and special studies prepared in the Army Historical Program.

**3-2. Responsibilities.** *a.* Regardless of the form of military history, its use is essential in staff planning and to the successful pursuit of a military career. Since most knowledge is gained through reading and study rather than through personal experience, military history is the best source of specialized knowledge available to the conscientious and responsible military professional. Accordingly each individual in the military profession is obligated to enlarge his body of military knowledge from military history, and consciously to seek a solution to

the problems facing him through the use of military history.

*b.* Paragraphs 3-6 through 3-8 are not to be construed as indicating that Army historians or Army historical officers have responsibilities that include the education and training, morale and esprit, and public and command information programs indicated. Such programs will continue to be conducted under other relevant Army regulations. However, Army historians and Army historical officers should cooperate, as necessary and feasible, in the preparation of such programs.

**3-3. Techniques of use.** The Army recognizes the principal ways in which military history can be used in the major military activities discussed in paragraphs 3-4 through 3-8.

*a.* As a source of data from which principles and procedures may be derived.

*b.* As a substitute for personal experience.

*c.* As a basis for establishing relationships between past experience and the requirements of the present.

**3-4. Development of doctrine.** Doctrine is the expression of principles, policies, and concepts which are derived from experience or theory, and compiled and taught for guidance. The military professional must rely upon experience from the past and present in determining through applied logic what should be done in the future. Accordingly, those who are responsible for the development of future military doctrine should employ, as appropriate, the findings of military history as background in the preparation of doctrine.

**3-5. Plans and operations.** The evaluation of past experience is of particular worth in deter-

mining plans and policies and in preparing for future contingencies. Staff action officers and study groups should, therefore, take full advantage of all information available on past experience applicable to problems under study, consulting as necessary with Army historians, Army historical offices, or the Office, Chief of Military History for advice and guidance.

**3-6. Professional education and training.** *a.* To supplement the knowledge of specialized activities gained by personal experience or through formalized education, military professionals are expected to exploit Army historical publications in order to expand their store of military knowledge.

*b.* Historical examples will be carefully selected and liberally employed in military training in order to—

(1) Assist in the visualization of abstract ideas, concepts, and principles.

(2) Permit procedural comparisons reflecting varying degrees of success or failure.

(3) Assist in understanding procedures, methods, and techniques.

(4) Provide group interest and motivation.

**3-7. Morale and esprit.** The ultimate goal in the development of troop morale and esprit is an "organizational" morale and esprit wherein

each individual voluntarily subordinates self-interest to the objectives of the collective organization. Organizational history and associated activities will be used to picture the military organization as a subsisting entity with a heart and a soul, a birth date, anniversaries, a home, ancestors, progeny, and successes and reverses so as to promote an individual identification with the organization which transcends time, social position, and personal inconvenience. The brave deeds and honorable service of the past will be established as the standards against which current and future performance will be measured.

**3-8. Public and command information.** Military history is one of the most useful tools for public and command information activities. By reflecting the glories, hardships, successes, and failures of our military, social, and cultural heritage, it is a source of pride and individual identification which can be used to achieve many Army goals. Accordingly, military history will be used when appropriate, in the following activities:

*a.* Displays and exhibits.

*b.* Military and civil celebrations.

*c.* Speeches.

*d.* News stories.

*e.* Radio and television programs.

## CHAPTER 4

### ARMY HISTORICAL PROGRAM SYSTEM

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**4-1. General.** *a.* The purpose of the Army Historical Program System is to provide an orderly means for supervising and controlling the preparation and use of military history in the attainment of military objectives. The system consists of several interrelated components—a long-range historical plan, an Army fiscal year program, and multiple command fiscal year programs.

*b.* The Army Historical Program system does not duplicate the Department of the Army programing system, but rather is an ancillary system functioning in consonance with the latter to provide detailed guidance in a specialized area of activity to commands and agencies responsible for attaining Army fiscal year objectives.

*c.* The Chief of Military History is responsible for the functioning of the Army Historical Program system, and for the preparation of the Army Long-Range Historical Plan, and the Army Historical Program. Commanders of organizations and agencies subordinate to the Department of the Army are responsible, as specified in paragraphs 4-4 and 4-5 for the preparation and implementation of command historical programs including appropriate modifications in the event of mobilization.

**4-2. Army Long-Range Historical Plan.** *a.* Army requirements for military history are projected over a 10-year period and formulated as objectives and policies into the Army Long-Range Historical Plan. The Plan is reviewed annually, revised as required and incorporated into a document which is published and distributed as necessary to reflect the significant changes made during revision.

*b.* The purpose of the Army Long-Range Historical Plan is to identify those future Army

historical objectives which can be determined in the light of present circumstances and a reasonable prediction of Army requirements for the future. Thus the plan provides a basis for programed continuity to Army historical activities, and serves as a guide to planners.

**4-3. Army Historical Program.** *a.* The Army Historical Program is the administrative technique for the management of the historical activities of the Army for the fiscal year period. The program specifies the objectives to be attained, the policies to be followed, and the budgetary matters to be considered. It serves as a means of task assignment, and provides a basis for implementing action, supervision, and progress measurement.

*b.* The program concerns itself with the nearest fiscal year period included in the Army Long-Range Historical Plan. It is reviewed and formulated in a program document which is published annually and distributed in sufficient time to provide guidance to subordinate commands and agencies in the preparation of command historical programs.

**4-4. Command historical programs.** *a.* A command historical program is the administrative technique for the management of the historical activities of a command for a fiscal year period. The term "command historical program" is primarily a generic term facilitating the management and discussion of matters concerning the preparation and use of military history, since command historical programs will become parts of broader command programs. Whenever possible the command historical program should be consolidated into a single document.

*b.* Where command operating programs are required, command historical programs will be

included as an integral part of such command operating programs.

c. The command historical program, whether a part of the operating program, a section of a broader administrative program, or a separate command program, will consist of tasks assigned by the Army Historical Program and implementing directives, and of objectives conceived by local commanders as necessary and appropriate in discharging the responsibilities assigned by this regulation. The commander's objectives may be supplemented or implemented by the scheduling of historical tasks of lesser scope than those assigned by the Army Historical Program.

**4-5. Mobilization modifications.** a. The Army Historical Program will contain instructions for program modification in the event of any degree of mobilization. Specific modifications to the program will be made in accordance with instructions issued at the beginning of the mobilization period.

b. Before the end of mobilization, a new Army Historical Program will be published, geared to the wartime historical requirements existing at that time.

c. Where commands, agencies, and installations are required by AR 11-5 to prepare command mobilization programs, such programs will make provision for discharging the responsibilities and tasks assigned in the Army Historical Program as modified for mobilization.

**4-6. Historical Program Advisory Committee.** a. In order to insure that the Army Long-Range Historical Plan and the Army Historical Program reflect a practical balance between user requirements and producer capabilities, the Chief of Military History is assisted by the Historical Program Advisory Committee, whose members represent both using and preparing agencies.

b. The Historical Program Advisory Committee consists of a chairman, a secretary, and three other members from the Office of the Chief of Military History, and one repre-

sentative from each of the following: Office of the Deputy Chief of Staff for Military Operations; Office of the Deputy Chief of Staff for Personnel; Office of the Deputy Chief of Staff for Logistics; Office of the Assistant Chief of Staff for Force Development; Office of the Chief of Research and Development; US Continental Army Command; US Military Academy; US Army War College; US Army Command and General Staff College; US Army Materiel Command; US Army Combat Developments Command; and US Army overseas commands when specifically designated.

c. The Historical Program Advisory Committee may meet at the call of the Chief of Military History to evaluate and submit recommendations on proposed revisions of the Army Long-Range Historical Plan and Army Historical Program, or review the proposed revisions on a circulating basis.

**4-7. Historical directives.** Since the documents discussed in paragraphs 4-2, 4-3, and 4-5 serve as planning guidance as well as directives, they are subject to change from the time of their publication until superseded. Accordingly, changes having general application will be made as change orders, with the same distribution as the document changed. Changes having only specific application will be made as letter directives addressed to the command or agency concerned.

**4-8. Distribution.** a. The Army Long-Range Historical Plan will be distributed periodically to the major commands.

b. The Army Historical Program will be distributed to major commands in March preceding the beginning of the target fiscal year. Sufficient copies will be provided to permit further distribution within major commands as determined by the command.

**4-9. Execution and supervision.** a. Execution of the Army Historical Program will be accomplished as prescribed therein, effective with the beginning of the target fiscal year. The Army Mobilization Historical Program is effective with the beginning of the target fiscal year, but will be executed only by specific

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direction, and then only in accordance with instructions issued at that time.

b. Supervision of execution will be continuous at all echelons. The Chief of Military History is responsible for overall Department

of the Army supervision and will accomplish that function through the Historical Program Progress Report (chap. 5) and a series of staff visits. A schedule of planned staff visits will be published at the beginning of each fiscal year.



## CHAPTER 5

### HISTORICAL PROGRAM PROGRESS REPORT

(Reports Control Symbol CSHIS-4(R2))

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**5-1. General.** *a.* This chapter establishes the responsibilities, policies, and procedures for reporting quarterly progress of the Army Historical Program.

*b.* A Historical Program Progress Report will be prepared and submitted to the Chief of Military History by the commanders specified in paragraph 5-2. The report will reflect the progress attained at the end of the fiscal year quarters in completing those projects for which responsibility is assigned in the Army Historical Program, including the Annual Historical Summaries, and such other major projects, including recurring reports, as may be assigned by the commanders concerned to their staff historians. This report will include the current authorized and actual strength of military and civilian professional and clerical personnel employed full time in historical work.

**5-2. Responsibilities.** The following commands and staff agencies with operating responsibilities will submit Historical Program Progress Reports:

- a.* The Chief of Engineers.
- b.* The Surgeon General.
- c.* US Continental Army Command (includes US Army Forces STRIKE Command and US Army Forces, Atlantic).
- d.* US Army Materiel Command.
- e.* US Army Combat Developments Command.
- f.* US Army Air Defense Command.
- g.* US Army Strategic Communications Command.

*h.* US Army Intelligence Command.

*i.* US Army, Europe.

*j.* US Army, Pacific.

*k.* US Army, Alaska.

*l.* US Army Forces Southern Command.

*m.* Military Traffic Management and Terminal Service.

*n.* US Army SAFEGUARD System Office.

**5-3. Preparation.** *a.* The report will be prepared in typewritten form, discussing each project in a separate paragraph arranged in numerical order by project number and title, or in the case of the annual historical summary, with the title and Reports Control Symbol. Project progress will be stated in simple terms indicating what has been completed by stage of planning, research, writing, or revision. Writing progress will be indicated by chapters or sections completed, and whether or not such completion is a first or final draft. Percentages will not be used to indicate progress.

*b.* Since the type of information desired in the report normally will be available to the headquarters of the commands concerned, feeder reports will not be established without the approval of Headquarters, Department of the Army.

**5-4. Submission.** Historical Program Progress Report will be prepared as of the last day of March, June, September, and December and dispatched to the Chief of Military History, Department of the Army, Washington, DC 20315, not later than 15 workdays after the report date.



## CHAPTER 6

### HISTORICAL PUBLICATIONS

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**6-1. General.** The Office of the Chief of Military History produces for the use of the Army and the general public a variety of historical works categorized as historical publications. This chapter establishes the policies, responsibilities, and procedures for the preparation, publication, and distribution of historical publications.

**6-2. Explanation of term.** "Historical publications" are historical volumes constituting a systematically presented account of operational, logistical, or administrative events. Historical material contained therein may be presented in narrative, documentary, or pictorial form, or a combination of one or more of these forms. In some cases, when warranted by subject matter and interest, historical monographs (chap. 7) may be redesignated as historical publications to be handled in accordance with the provisions of this chapter.

**6-3. Responsibilities.** The Chief of Military History is the final authority on matters concerning military history, subject to the approval of the Chief of Staff on each projected historical publication before the work begins on it.

**6-4. Preparation.** Historical publications normally will be prepared in the Office of the Chief of Military History. The preparation process will include research, writing, illustration, review, and editing. Historical publica-

tions will be prepared in accordance with professional standards prescribed by the Chief of Military History. The Chief of Military History does not prepare histories of individual units. Such histories are prepared by unit personnel or by private organizations (chap. 9).

**6-5. Publications.** Historical publications will be published in accordance with the provisions of AR 310-1.

**6-6. Distribution.** *a.* Historical publications will be distributed within the Army in accordance with procedures acceptable to the Chief of Military History (CMH) and The Adjutant General. Initial distribution will be made down to battalion level, as appropriate from the standpoint of subject matter. All CMH historical publications are available to any Army battalion or higher level organization on request. Such requests will be addressed to the Chief of Military History.

*b.* Unclassified historical publications will also be distributed to Government depository libraries, and will be sold to the public by the US Government Printing Office.

**6-7. Disposition.** When organizations are being inactivated or discontinued or otherwise are unable to care for and use Army historical publications, commanding officers will turn in such publications to the property disposal officer servicing their organization.



## CHAPTER 7

### HISTORICAL MONOGRAPHS

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**7-1. General.** This chapter establishes the policies, responsibilities, and procedures for the preparation and distribution of historical monographs.

**7-2. Explanation of term.** "Historical monographs" are detailed, systematically presented historical works focused on specific military subjects.

**7-3. Responsibilities.** *a.* The Deputy and Assistant Chiefs of Staff, Headquarters, Department of the Army and commanders of major Army commands and oversea Army component commands will propose to the Chief of Military History monographs for which they have a need; all proposals will include a written justification and a desired completion date.

*b.* The Chief of Military History will approve a projected monograph before action to prepare it is initiated.

*c.* Major commanders having assigned staff historians and the Chief of Military History will be responsible for the preparation of all historical monographs assigned to their respective command or agency by the Army Historical Program, change orders pertaining thereto, or historical directives.

**7-4. Preparation.** *a.* Historical monographs will be prepared in accordance with professional historical standards established by the Chief of Military History.

*b.* The research, writing, and preliminary

review functions involved in the preparation of historical monographs will be performed by the staff, command, or agency assigned responsibility for preparation. After intermediate review by higher headquarters as required, historical monographs will be transmitted to the Chief of Military History for final review.

**7-5. Publication.** If warranted the Chief of Military History may determine that historical monographs shall become Army historical publications to be handled in accordance with the provisions of chapter 6.

**7-6. Reproduction and distribution.** After review by the Chief of Military History, reproduction and distribution of monographs by the preparing agency or command is authorized. Distribution outside the Department of the Army will not be made except with the approval of the Chief of Military History. Monographs will not be offered for public sale.

**7-7. Accounting.** *a.* Unclassified historical monographs are considered expendable under the provisions of AR 310-1.

*b.* Classified historical monographs will be accounted for in accordance with applicable security regulations.

**7-8. Disposition.** When organizations are disbanded, discontinued, or otherwise are unable to care for or use unclassified historical monographs, commanding officers thereof will turn in all such excess monographs to the nearest Army Library, where they will be screened and retained or destroyed.

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## CHAPTER 8

### ANNUAL HISTORICAL SUMMARY

#### Reports Control Symbol CSHIS-6(R2)

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**8-1. General.** *a.* This chapter establishes the responsibilities, policies, and procedures for the preparation of annual historical summaries by specified Department of the Army staff agencies, major continental commands, and major oversea commands.

*b.* Annual historical summaries serve a two-fold purpose—they provide a reference and research base for the preparation of official histories of the Army; they provide preparing agencies and commands with a current summary record of their activities to serve as a reference guide for current and future operations.

**8-2. Responsibilities.** *a.* Annual historical summaries will be prepared by the following staff agencies and commands. Summaries prepared by General Staff agencies may, but are not required to, include annexes covering operations of the Special Staff agencies for which they have supervisory responsibility.

- (1) Deputy Chief of Staff for Logistics.
- (2) Deputy Chief of Staff for Military Operations.
- (3) Deputy Chief of Staff for Personnel.
- (4) Comptroller of the Army.
- (5) Chief of Research and Development.
- (6) Chief, Office of Reserve Components.
- (7) Assistant Chief of Staff for Force Development.
- (8) Assistant Chief of Staff for Intelligence.
- (9) Assistant Chief of Staff for Communications-Electronics.
- (10) Chief of Legislative Liaison.
- (11) The Chief of Engineers.
- (12) The Surgeon General.

- (13) The Judge Advocate General.
- (14) Chief of Information.
- (15) US Continental Army Command.
- (16) US Army Materiel Command.
- (17) US Army Combat Developments Command.
- (18) US Army Air Defense Command.
- (19) US Army Strategic Communications Command.
- (20) US Army Intelligence Command.
- (21) US Army, Europe.
- (22) US Army, Pacific.
- (23) US Army, Alaska.
- (24) US Army Forces Southern Command.
- (25) Military Traffic Management and Terminal Service.
- (26) US Army SAFEGUARD System Office.
- (27) US Army Directorate of Military Support.

*b.* Each staff agency, except the Office of the Chief of Engineers, the Office of The Surgeon General, and the Safeguard SYSTEM Office, listed in *a* above will designate an Army historical officer to be responsible for the preparation of its annual historical summary and will keep the Chief of Military History currently informed of this designation. The annual summaries of the commands, the Office of the Chief of Engineers, the Office of The Surgeon General, and the SAFEGUARD System Office will be prepared by Army historians.

*c.* Except with the specific approval of the Chief of Military History, this requirement will not be used to justify periodic reports (para 1-2d(10)(b), AR 335-15) from sub-

ordinate elements to preparing agencies and commands.

**8-3. Preparation.** *a.* The annual historical summary will be prepared in accordance with guidance contained in appendix A, and will consist of a concise narrative summary, or collection of brief monographs, dealing with events and developments that, in the opinion of the preparing agency, are of major historical importance. The narrative should concentrate on an objective analysis of these developments and events, the operating difficulties arising therefrom, and the underlying reasons for related administrative and policy decisions. Failures as well as successes will be reported. Routine developments, events, and procedures will be treated only when necessary to provide background and explanation, establish patterns, illustrate changes, and to describe methods and management systems. Pertinent data, particularly statistical data, appearing in other reports that will form part of the permanent record should be summarized only as necessary to indicate trends or illustrate important changes. Reference should be made to reports containing such data where relevant so as to assure its accountability as part of the historical record.

*b.* All items of prime historical significance up to and including those with a security classification of TOP SECRET-RESTRICTED DATA-NO FOREIGN DISSEMINATION will be reported. Limited distribution supplements will be employed for material requiring additional security safeguards.

*c.* The annual historical summary will include a narrative account of any major organizational changes during the reporting period and the reasons therefor.

*d.* The annual historical summary will be

organized and prepared in such a manner as to provide the preparing agency or command with a current summary record of its principal activities to serve as a reference guide for current and future operations and as a continuing source of orientation for personnel.

*e.* Necessary action will be taken by all preparing staff agencies and commands to insure the establishment and maintenance of accurate and adequate staff records pertaining to current operations, and to insure preservation of all records used in preparing annual historical summaries, in accordance with applicable records retirement regulations.

**8-4. Assistance in preparation.** The Chief of Military History will provide advice and assistance to historical officers in the preparing staff agencies and to Army historians in the commands to facilitate preparation of these summaries. Designated personnel from his office will be available for consultation and will make staff liaison visits for this purpose.

**8-5. Frequency and submission.** *a.* An annual historical summary will be prepared for each fiscal year period.

*b.* Staff agencies (para 8-2a(1) through (14)) will forward one copy of the summary, the ribbon copy when not reproduced, to the Chief of Military History not later than 150 calendar days following the reporting period.

*c.* Those commands which constitute the US Army subordinate command of a joint, unified, or combined command, to which they are required to submit a similar historical summary prepared on a calendar year basis, will be permitted, on request, to prepare and submit the annual historical summary on that same basis, not later than 150 days after the end of the calendar year.

## CHAPTER 9

### ORGANIZATIONAL HISTORY

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**9-1. General.** This chapter establishes the responsibilities, policies, and procedures for the use of organizational history in enhancing organizational morale and esprit, individual and group motivation and interest, and public pride and respect in organizations of the US Army.

**9-2. Explanation of terms.** *a.* "Organizational history" is the entire body of events concerned with a specific military organization, its participation as a part of, and its contribution to the objectives of the larger military forces to which it has belonged. These events may or may not be represented by tangible evidence such as a written narrative record, pictures, photographs, official records, historical properties, and the like.

*b.* "Unit history" is the written narrative record of the history of a specific military organization, and may be supplemented and supported by other tangible evidence of the events concerned with the organization.

*c.* "Organizational history file" is the administrative collection and inventory of all tangible evidence, except historical properties, concerned with the history of a specific military organization.

**9-3. Responsibilities.** *a.* Commanders of all organizations which are authorized an organizational color, distinguishing flag, or guidon (except organic elements of color-bearing organizations) are responsible for including in their command historical program, as a minimum, the objectives, policies, and projects concerned with the organizational history activities specified in paragraphs 9-5 through 9-11.

*b.* Commanders of the following Army organizations, except those required to report

under AR 40-226, are urged to prepare unit histories and annual supplements for their organizations:

(1) Separate TOE units down to and including the level of company, troop, or battery.

(2) CONUS service schools and colleges.

(3) Permanent installations included in the detailed DA Stationing Plan for Permanent Construction. Installations classified as support in reference document need not prepare unit histories.

*c.* Unit histories and annual supplements need not be prepared for those periods when an organization is required to prepare an Operational Report—Lessons Learned under the provisions of AR 525-15.

*d.* Commanders of commands and agencies required to prepare an historical summary (chap. 8) and TDA organizations other than those mentioned in *b*(2) and (3) above may prepare unit histories and annual supplements. Commanders of major Army commands may require selected key subordinate TDA and TOE organizations to prepare organizational (unit) histories and annual supplements.

*e.* Commanders of separate TOE units down to and including the level of company, troop, or battery, are responsible for establishing and maintaining an organizational history file, properly retiring it in the event the organization is unable to care for it, and requesting it from storage when the organization is again able to care for it (see AR 340-18-2 and AR 340-2). All TDA organizations mentioned in *b*(2) and (3) above, and TDA organizations required by major commanders to render unit histories and annual supplements will also establish and maintain organizational history files; other TDA organizations may, but are not required to maintain such files.

f. The preparation of organizational (unit) histories and the maintenance of organizational history files will not be used as justification to employ additional Army historians. These functions will normally be assigned to an Army historical officer.

**9-4. Organizational history activities.** The objective of organizational history activities is to develop within each member of the Army a degree of self-esteem, unit pride, and sense of teamwork which subordinates self-interest to the organization's goal. To that end, organizational history activities must be a carefully planned effort tailored and balanced to meet the specific requirements of each organization. Organizational history activities that are considered essential to a successful command historical program are described in paragraphs 9-5 through 9-11.

**9-5. Military history indoctrination.** In order to acquaint Army personnel with the facts and events behind the military heritage and traditions of the US Army and the organization to which they are assigned, a formal system of military history indoctrination is outlined below as a guide for implementation at the following specified echelons. Deviations may be made at the discretion of the commander concerned.

a. *Recruiting stations.* US Army recruiting stations, recruiting main stations, and Armed Forces Examining and Entrance Stations (AFEES).

(1) *Emphasis.* National defense will be stressed.

(2) *Materials.* Displays of drawings, paintings, photographs, and posters depicting military events and scenes, flags, uniforms, and insignia, may be used. The displays should serve to inculcate and promote pride in the service and should assist in developing attractive interiors designed to make a favorable impression on prospective enlistees.

b. *Reception Stations.*

(1) *Emphasis.* History of the US Army will be the main theme.

(2) *Materials.*

(a) A copy of the Soldier's Guide (FM 21-13) will be issued to each newly inducted or enlisted individual.

(b) Short movies, such as "The Traditions and Heritage of the US Army," and/or "Wearing the Uniform" will be shown.

(c) Posters, flags, pictures, and similar appropriate materials will be displayed.

c. *Training divisions and replacement training centers.*

(1) *Emphasis.* During the indoctrination phase of basic combat training, emphasis will be placed on the development of pride in the Army through an understanding of the Army's achievements and traditions.

(2) *Materials.* Displays of paintings, photographs, or posters depicting military scenes or events, flags, or similar articles, should be used in support of this program in dayrooms, mess halls, visitors' reception rooms, and entrances to administrative buildings. Military histories, both official and popular, will be made available and prominently displayed in post libraries and information centers.

d. *Operational units.* Instruction of personnel in achievements of the US Army and in unit history will continue during all phases of training of operational units. At least once annually, all personnel will be acquainted with the accomplishments, traditions, and battle records of the unit to which assigned. For films pertaining to specific military organizations, see DA Pam 108-1.

**9-6. Military history exhibits.** The formal system of military history indoctrination provides no more than an educational base which must be supplemented by a system of military history exhibits, both formal and informal, which are constantly before all personnel.

a. Installation and organizational museums are the most effective type of exhibit because they provide tangible evidence of the history and traditions of the units, and can be pointed out to visitors with pride. Thus they serve as a focal point for the development of joint understanding between a military organization and the local community.

b. Simple military exhibits consisting of pictures, posters, photographs, single trophies, copies of maps and records, and the like are most effective when used as decoration or displayed where personnel spend appreciable time, such as messhalls, barracks, bulletin boards, and administrative buildings.

c. Colors, distinguishing flags, and guidons serve as excellent focal points around which exhibits can be arranged, using such items as Lineage and Honors Certificates, certificates of organizational decorations, military uniform pictures, photographs, portraits, and replicas of coats of arms.

d. Special occasions, such as Armed Forces Day, and Unit Day, which are marked by celebrations, ceremonies, reviews, and public open house, afford excellent opportunities for the display of military history exhibits complementing and enhancing the character of the occasion.

e. Army historical art exhibits available on loan from the Office of the Chief of Military History are suitable for displays in libraries and service clubs.

f. Standard sets of 25 photographs of significant events in Army history dating from the Revolutionary War are available on request from the US Army Photographic Agency, Washington, DC 20310.

g. Thirteen colored posters of combat scenes from Army history are available through regular publications channels, and by purchase from the Superintendent of Documents, Government Printing Office, Washington, DC 20402. Posters are numbered DA posters 21-32, 21-37 through 21-48, and 21-73.

h. Thirty reproductions are available depicting the American fighting men at various periods in our history. These full color prints were originally painted by H. Charles McBaron as part of the Army Historical Program. The reproductions consist of three sets entitled The American Soldier with each set containing ten pictures. The first set covers the years 1781-1855 and costs \$1.00; set two covers the years 1863-1963 and set three spans the

period 1775-1965. The cost of sets two and three is \$1.50 each and all can be bought from the Superintendent of Documents, Government Printing Office, Washington, DC 20402.

9-7. Unit Day. a. Commanders of divisions, brigades, groups, logistical commands, division support commands, division artillery headquarters, regiments, battalions or squadrons of Combat Arms Regimental System, separate battalions, and separate companies organized under a TOE will select a day which will be designated as Unit Day. This should be a day made noteworthy by some significant event in the history of the organization, not necessarily the day upon which it was first organized. The date of constitution in an Army component should not be selected. Constitution is a term used to designate and place a new TOE organization on the rolls of the Army in an inactive status. An organization does not accrue history until it is activated or organized. Commanders of elements of regiments under the Combat Arms Regimental System will coordinate their selection and mutually agree upon a single day to be celebrated as Unit Day by the regiment and all of its elements. The organization will observe Unit Day as a holiday on which it commemorates its history and engages in suitable ceremonies that stress its lineage and traditions, including accomplishments of its personnel. The program should feature music and other forms of entertainment. When Unit Day falls on a Saturday, Sunday, or holiday, or it is impracticable to celebrate on the officially designated date because of maneuvers or other similar activities, commanders may select another date on which to observe Unit Day. The day selected by each organization and the historical significance thereof, will be reported officially through the Chief of Military History, Department of the Army, Washington, DC 20315, to The Adjutant General, ATTN: AGAO-D, Department of the Army, Washington, DC 20315. An organization may request a change in the date of its official Unit Day when warranted by an event of particular historical significance occurring subsequent to the original selection.

b. The Chief of Military History will provide each organization designated in *a* above with a certificate suitable for framing which attests to its approved Unit Day.

c. Commanders of organizations other than those listed in *a* above may at their own discretion hold similar ceremonies; however, the Chief of Military History will not furnish certificates to them.

**9-8. Organizational ceremonies.** Ceremonies in honor of a military organization enhance its corporate character and should be conducted on all appropriate occasions, in addition to those shown in *a* through *c* below.

a. *Reading of citations.* So far as is practicable, a review will be held on each anniversary of the award of a citation or decoration which the organization has received. During the ceremony the citation for the award will be read at escort to the color or distinguishing flag when such color or flag is a part of the ceremony.

b. *Initiation of recruits.* After recruits join an organization, and as soon as qualified as soldiers by their commanding officers, they will be formally presented to the organizational distinguishing flag, color, or guidon, whichever is the senior flag. The lineage, awards, battle honors, coat of arms, and organizational insignia of the command will be described and the manner in which the recruits are expected to carry on the organization's traditions will be explained. At this formation the recruits will be presented with the organizational insignia and, thereafter, will be permitted to wear any authorized organizational decorations and emblems. Initiation of recruits may take place on a Unit Day or any other appropriate occasion.

c. *Recognition of former outstanding members.* Past members of an organization who have earned the Medal of Honor or other award for valor should be recognized during Unit Day ceremonies, personnel orientation periods, or other appropriate occasions. During these ceremonies, the citation announcing the award should be read and information about

the former member related to the unit. Former members who have become outstanding either in military or civilian life may also be similarly honored.

**9-9. Military history publications.** Activities concerned with military history publications are—

a. Acquisition of those historical publications of the Department of the Army authorized for distribution to the organization concerned (ch. 2 and 6).

b. Preparation and distribution of historical booklets deemed by the organization commander to be the best suited for the requirements of his organization's command historical program (para 9-10).

c. Preparation of a unit history (para 9-12).

**9-10. Military history in training.** a. Army history will be emphasized in discharging the training responsibilities specified in chapter 2. In those instances where the organization has an extensive operational history, examples should be drawn from that history illustrating the manner in which principles and procedures were applied in the past to problems with which current training is concerned, i.e., night combat, motorized patrols, defense of a river line, attack of a fortified position, and the like.

b. Concurrent analysis and correlation of the organizational history with the training program for the purpose of identifying historical examples to be used in illustrating current instruction should not be limited to combat arms organizations only, but should be practiced by administrative and technical service organizations as well.

c. Commanders are encouraged to prepare and distribute booklets based on a military history theme. Commanders may encourage unit fund activities to participate in the cost of reproduction by mimeographing or printing, subject to the provisions of AR 230-1.

d. When historical material is not available to an organization for the preparation of book-

lets, the Chief of Military History will direct the organization to sources of its own history, or to basic sources, or will supply it with available historical information, upon request by the organization concerned. Priority will be given by the Chief of Military History to requests for organizations of regimental or separate battalion size in active service.

**9-11. Historical memorial awards.** *a.* Any TOE organization with a particularly outstanding history is authorized and encouraged to establish a historical memorial award in the name of a battle or campaign in which the organization participated, or in the name of an outstanding former member of the organization. The historical memorial award will be presented annually to that member of the current organization who best reflects those qualities of character and devotion to duty which were paramount in the action of the individual or on the occasion honored by the award.

*b.* Presentation of the award will be accompanied by an appropriate military ceremony in which the entire organization will participate, and will be supported by appropriate publicity. Applications for approval of historical memorial awards will be forwarded to the Office of the Chief of Military History and will contain the name of the person or event to be honored, a brief description of the action concerning the occasion, and the qualities of character and devotion to duty that were displayed.

*c.* Cost of trophies, plaques, certificates, or other devices representing the awards which are given to the recipient of the honor may be met out of unit funds in accordance with AR 230-1.

*d.* Only one award is authorized for each regiment of the Combat Arms Regimental System. Commanders of elements of regiments under the Combat Arms Regimental System should coordinate and mutually agree upon all matters concerned with the selection and presentation of the award.

**9-12. Preparation of unit histories.** *a. Responsibilities.* Responsibilities for the prepa-

ration of unit histories are specified in paragraph 9-3b through *e.* Unit histories are not official publications of the Department of the Army, but rather are unofficial publications of the organization concerned. Publication of unit histories may be financed by nonappropriated funds in accordance with provisions of AR 230-1 if a personal copy is furnished all members of the unit as a means of enhancing pride in the unit. The use of appropriated funds for publication of unit histories may be authorized by major CONUS and oversea commanders when copies are necessary to be provided to staff elements within the headquarters, to subordinate elements, and to higher headquarters for use as a reference source in the conduct of essential official business, and not for personal use.

*b. Source material.* Although source material for the preparation of unit histories may come from many areas, the policies with respect to the two principal sources are listed below:

(1) Official records of the Department of the Army are available for research in connection with the writing of unit histories. Conditions governing access to official records are prescribed in chapter 13. Requests for information about the location of and access to official Army records should be addressed to The Adjutant General, ATTN: AGAR, Department of the Army, Washington, DC 20315.

(2) Bibliographies of published histories of American military organizations are maintained by Headquarters, Department of the Army. Requests for bibliographical information about specific military organizations should be addressed to the Chief of Military History, Department of the Army, Washington, DC 20315.

*c. Preparation and review.* Unit histories and annual supplements will be prepared generally in accordance with the provisions of DA Pam 20-200.

(1) Inquiries relative to the preparation of unit histories, except those concerning the location of and access of Army records, should be sent to the Chief of Military History, De-

partment of the Army, Washington, DC 20315.

(2) Organization commanders must insure that histories accurately reflect the lineage and honors officially determined by the Department of the Army as outlined in chapter 10.

(3) Unit histories are not subject to historical review or revision by the Department of the Army.

(4) Annual supplements may be consolidated into a revised edition of the basic unit history at any time desired by organizational commanders.

(5) One copy of all basic unit histories, revised editions, and annual supplements will be placed in the unit's organizational history file (para 9-13c) where it will be available permanently as a reference. Another copy will be included with the command reporting files and retired as a part of those files.

*d. Distribution.* The distribution of unit histories (basic history or revised edition) and annual supplements is a responsibility of the preparing organization. In this connection, Headquarters, Department of the Army, does not find it practicable to furnish lists to unit members, former members, or their next of kin, for use in distribution.

(1) Whenever a basic unit history, revised edition, or annual supplement is prepared in published form, organizations of the Active Army and Army Reserve will furnish the Chief of Military History two copies, without cost.

(2) Organizations of the Army National Guard in active Federal service preparing such histories in published form, will furnish the Chief of the National Guard Bureau with four copies, two of which will be forwarded to the Chief of Military History.

(3) Annual supplements, when prepared, should be completed not later than 31 March of the year following the calendar year covered. Commanders of CONUS major Army commands and oversea Army component commands will issue such instructions as deemed appropriate to ensure compliance with this requirement.

*e. Content of unit histories and annual supplements.* Unit histories and annual supplements should be unified narrative reports of the activities of the organization. The developments and events selected to be included in the history should be those of importance to the unit and to the Army and not those of routine administration. Brief negative reports are not considered adequate. Also, a report is not complete unless it contains sufficient references to identify the sources from which the information was obtained. Sources of information are: official correspondence and memorandums for record; past annual historical supplements; other periodic reports of various types; public information releases; fact sheets; newspaper, periodical and journal reports; observations recorded by personnel; reports or studies of plans or operations; and personal interviews. The inclusion of extra copies of important documents to supplement the text is desirable but optional. Copies of a document of a routine nature which do not illustrate or amplify the text should not be included.

*f. Unit histories and annual supplements.* Unit histories and annual supplements are exempt from reports control procedures (para 7-2p, AR 335-15).

*g. Unit history photographs.* The original or copy negative of all photographs included in unit histories will be properly identified and forwarded to the US Army Photographic Agency, Washington, DC 20310, for permanent file.

**9-13. Organizational history file. a. General.** In order that each commander may have for his use documentary evidence of his organization's history, its traditions, and its right to its organizational historical properties, provision has been made for organizations to retain copies of certain documents, photographs, and other items pertaining to their history and traditions; for storage of these materials during periods of the owning organization's inability to care for them; and for their return to the owning organization when it is again able to care for them.

*b. Responsibilities.* General responsibilities

for organizational history files are specified in paragraph 9-3e.

(1) Commanders of organizations required to maintain organizational history files are responsible for selection of appropriate items for them; for preparing and shipping these files to storage during periods of the organization's inability to care for them; and for requesting their return from storage to the owning organization. Commanders will address their requests for return of stored files to the Chief of Military History, Department of the Army, Washington, DC 20315, for verification of the organization's entitlement to those files. (See AR 340-2 and AR 340-18-2.)

(2) Upon receipt of a commander's request for return of stored organizational history files, the Chief of Military History will prepare an up-to-date Lineage and Honors Certificate for the organization, if necessary. A copy of the certificate will be forwarded as verification of entitlement, together with the commander's request, to the proper records center.

(3) The Adjutant General has made provisions for the storage of organizational history files during periods of the owning organization's inability to care for them. The holding agency will return these files to the owning organization upon receipt of verification of entitlement from the Chief of Military History.

*c. Content of files.*

(1) Organizational history files will consist of, but not be limited to, unit history and

annual supplements; Lineage and Honors Certificates; data on organizational flags, coats of arms, and distinctive insignia (where applicable); citations for organizational decorations; newspaper, book, and magazine clippings; unframed photographs, pictures, certificates, and letters; programs and other data relating of historical ceremonies and organizational traditions; copies of letters and orders pertaining to activations, inactivations, redesignations, and reorganizations; and other documents of primary interest and value to, and directly connected with, the specific organization.

(2) Installation history files, if required in accordance with the provisions of paragraph 9-3e, will consist of, but not be limited to, the material mentioned in (1) above, and will additionally contain, when appropriate, available long-range and broad-scope reports or studies on installation operations based on qualitative and quantitative assessment of performance in major missions and functions. The command assigned installation jurisdiction according to DA Pam 210-1 will monitor the maintenance of installation history files.

*d. Preparation of files.* Items for inclusion in organizational history files will, so far as is practicable, be filed in numbered and labeled manila file folders. The first folder in the front of the file will contain a table of contents. Items which are self-explanatory or identified by date, such as photographs, will be captioned to include the date of the event.



## CHAPTER 10

### LINEAGE AND HONORS

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**10-1. General.** This chapter establishes the responsibilities, policies, and procedures for determining and publishing the lineage and honors of military organizations, and for authorizing unit special designations.

**10-2. Explanation of terms.** *a.* The explanation of the terms pertaining to the designation and classification of units specified in AR 220-5 is applicable to the subject of lineage and honors.

*b.* "Lineage" is the line of descent of a military organization from its origin, stated in terms of the broad events which have changed its character or composition.

*c.* "Honors" are the awards that have been bestowed by competent authority upon a military organization as a corporate entity, and consist of campaign participation or war service credits and unit decorations.

*d.* "Military organizations" are TOE armies, corps, divisions, brigades, groups, regiments, separate battalions, and battalions or squadrons of regiments in the Combat Arms Regimental System; and separate companies, batteries, troops, and comparable elements authorized an organizational color, distinguishing flag, or guidon under the provisions of AR 840-10.

*e.* "Color bearing organizations" are regiments, separate battalions, and battalions or squadrons of regiments in the Combat Arms Regimental System authorized organizational colors symbolic of their branch and past history. The composition of such organizations is fixed by tables of organization and equipment.

*f.* "Flag bearing organizations" are TOE organizations having a fixed headquarters and a varying number of separate subordinate elements.

*g.* "Guidon bearing organizations" are TOE units authorized a guidon under the provisions of AR 840-10.

**10-3. Responsibilities.** *a.* The Chief of Military History is responsible for determination and publication of the lineage and honors of military organizations of the Army, as defined in paragraph 10-2, and for approving applications for unit special designations.

*b.* The Adjutant General is responsible for determining that the approved coats of arms and distinctive insignia for military organizations are based upon the lineage and honors of the organization concerned.

**10-4. Lineage principles.** The following principles will be applied in determining the lineage of all military organizations:

*a.* Constituted military organizations are subsisting entities with a distinctive character of their own. Only valid historical facts will be employed in the determination of lineage.

*b.* Organizations are designated and their status changed from time to time, as prescribed in AR 220-5, to accord with organizational requirements. The designation of an organization, either numerical, named, or lettered, will not in itself establish a lineal relationship with a former organization which might have had the same designation. The lineage of an organization will be determined by factual relationship of all substantive changes in status which it may have experienced.

*c.* In exceptional circumstances the Secretary of the Army may grant an active organization the honors of an inactive or disbanded organization to be held as a challenge and a trust. The endowment of such honors will not in itself establish a lineal relationship between the two organizations.

d. Lineages will be determined only for TOE flag or color bearing organizations and for TOE guidon bearing organizations not subordinate elements of color bearing organizations. TDA organizations do not possess official lineages and honors and none will be determined for them; however, such organizations may, upon application to The Adjutant General, ATTN: AGAO-D, Department of the Army, Washington, DC 20315, obtain historical background data.

e. The lineage of a color bearing organization, when organized from independent smaller organizations, will consist of the lineages of all such smaller organizations.

f. The lineage of a color bearing organization will not be changed by the removal of component organizations.

g. The lineage of a component organization removed from a color bearing organization transfers with the organization removed.

h. The lineage of a color bearing organization is considered to reside in the headquarters element.

i. A former military organization which has been disbanded may be reconstituted and placed on the rolls of the Army by the Secretary of the Army.

(1) The essence of the official lineal link between an active Army or Army Reserve organization thus placed on the rolls of the Army and a former organization which had been disbanded is the clear intent of such action to resurrect and perpetuate the latter organization.

(2) The essence of the official lineal link between an Army National Guard organization thus placed on the rolls of the Army and a former organization which had been disbanded is the clear intent of State action to resurrect and perpetuate the latter organization.

j. Since the lineages of Army National Guard organizations are linked historically with local geographical areas, such lineages will not be transferred out of local recruiting areas, except when Army National Guard or-

ganizations enter into Federal service, or when there is a physical change of station of a unit with its personnel.

k. For lineage purposes, the date of Federal recognition is considered to be the date of activation of an Army National Guard organization. In the absence of a date of Federal recognition, the date of activation or organization will be determined by the Chief of Military History from contemporary documents.

l. The lineages of Army Reserve organizations are linked with Army areas, except when they enter into active military service.

m. Lineage once determined and published will not be changed, unless it is clearly established that it has been based upon errors of fact.

**10-5. Honors and their passage.** The various types of unit honors, as defined in paragraph 10-2c, pass from one organization to other historically related organizations as follows:

a. The campaign participation credits of a color bearing organization consist of those campaign participation credits earned by the organization as a whole plus those awarded to two or more of its guidon bearing organizations (except for organizations under the Combat Arms Regimental System—see paragraph 10-7) prior to 1898 and those awarded to one-third or more of its guidon bearing organizations after 1897.

b. War service credit is awarded to TOE flag or color bearing organizations to recognize active Federal military service in a theater or area of operations. Such credit is not authorized for guidon bearing units or for organizations which have been awarded campaign participation credit for service in the same theater or area of operations during the same war or conflict. War service credit may pass to the direct descendant or descendants of the earning organization, provided such descendant or descendants are TOE flag or color bearing organizations.

c. The decorations of a unit consist of those United States and foreign unit decorations

awarded to the unit itself. These decorations may pass to the direct descendant or descendants of the earning organization, but the decorations of guidon bearing elements of a color bearing organization do not accrue to the parent organization in the same manner as in *a* above.

*d.* The honors of a color bearing organization will not be changed by the removal of component organizations.

*e.* The honors of a component organization removed from a color bearing organization transfer with it, but will not be adopted by any other color bearing organization to which it may transfer.

*f.* The honors of a color bearing organization reside in the custody of the headquarters element.

*g.* When a former military organization is reconstituted by the Secretary of the Army, it is entitled to the honors it held at the time it was disbanded.

*h.* An honor, once determined, will not be withdrawn unless it is clearly established that it has been based on errors of fact.

*i.* In the determination of honors of Army National Guard units, precedence will be given to lineage based on geographical area (para 10-4j).

**10-6. Display of honors.** *a.* Military organizations will display honors to which they are entitled in accordance with AR 672-5-1.

*b.* Honors awarded to a guidon bearing organization, but not to the color bearing organization of which it is a component, will be displayed as silver bands or streamers on the organizational guidon where authorized by AR 672-5-1.

*c.* Under no circumstances will an organization in Federal service display any honor not authorized by the Secretary of the Army.

**10-7. Combat Arms Regimental System.** The following procedures, in addition to those in paragraphs 10-5 and 10-6, apply to the pas-

age and display of honors by organizations under the Combat Arms Regimental System:

*a. Passage of honors.*

(1) Regimental honors will be determined by the Chief of Military History at the time the parent regiment is organized.

(2) Honors, other than decorations awarded by foreign governments, earned by an organization immediately subordinate to the parent regiment accrue to both the parent regiment and the subordinate organization, regardless of whether the latter is a color bearing or separate guidon bearing organization.

(3) Foreign decorations awarded to an organization subordinate to a parent regiment do not accrue to the latter.

(4) Campaign participation credits awarded concurrently to guidon bearing elements of color bearing organizations under the same parent regiment will accrue to the parent regiment if the combined numerical strength of those elements is equal to, or greater than, the strength of the smallest color bearing organization of the parent regiment.

(5) Honors accruing to an organization subordinate to a parent regiment, as a result of consolidation with another organization, will not accrue to the parent regiment.

*b. Display of honors.*

(1) Regimental honors determined at the time the parent regiment is organized will be displayed on the colors of both the regiment and regimental color bearing organizations.

(2) Honors, other than decorations awarded by foreign governments, awarded subsequent to organization of the parent regiment will be displayed by the parent regiment and the earning element only.

(3) Symbols representing foreign awards will be displayed by the earning organization only.

(4) Streamers indicating honors earned by a subordinate color bearing organization of the parent regiment will bear a distinctive earned honor device as prescribed by AR 672-5-1. Such earned honors will be indicated by asterisks on Lineage and Honors Certificates for color bearing elements. Since only

earned honors are shown on certificates for guidon bearing elements, asterisks will not be used for units of this type.

**10-8. Special designations.** In addition to the official designation prescribed in AR 220-5, TOE organizations may be authorized special designations to appear in parentheses following the official designations, except on colors, flags, or guidons.

*a.* Two types of special designations, as specified in (1) and (2) below, are authorized for the purpose of enhancing morale and esprit within a TOE organization by direct association of the organization with some person, place, thing, event, or function having particular significance in its corporate life.

(1) A "Traditional Designation" is a special designation which has been associated with a TOE organization for 30 or more years.

(2) A "Distinctive Designation" is a special designation with which a TOE organization desires to be associated.

*b.* A special designation will not be used by any organization unless specifically approved by the Department of the Army. Applications for the approval of a special designation should be addressed to the Chief of Military History, Department of the Army, Washington, DC 20315.

*c.* Only one traditional or distinctive designation will be approved for each division, brigade, regiment, separate battalion, separate company, or separate smaller TOE organization with an authorized strength of 50 or more persons. Commanders of elements of regiments under the Combat Arms Regimental System will coordinate their selection and mutually agree upon a single special designation for their regiment.

*d.* The same traditional designation may be authorized for more than one organization, although no more than one organization will

be authorized a particular distinctive designation.

*e.* A component element of a color bearing organization which submits sufficient valid evidence of having continuously used a special designation for a period of 50 or more years will be authorized a traditional designation without regard for any special designation which may have been approved for its parent organization.

*f.* Approval of a special designation, in general, will be based upon the requirement that the proposed designation—

(1) Is in consonance with generally accepted standards of good taste.

(2) Does not reflect unfavorably on the Nation, the Armed Forces, or the organization concerned.

(3) Is not in conflict with any law, regulation, or other legal bar to its use.

(4) Is associated with some person, place, thing, event, or function having special significance to the organization.

**10-9. Certification.** *a.* The Office of the Chief of Military History will provide all active organizations of the Regular Army, Army Reserve, and Army National Guard with certificates suitable for framing which attest to—

(1) Organizational lineage (Lineage and Honors Certificate).

(2) Traditional designation, when awarded (Traditional Designation Certificate).

(3) Distinctive Designation, when awarded (Distinctive Designation Certificate).

*b.* The Adjutant General will provide all active organizations of the Regular Army, Army Reserve, and the Army National Guard with similar certificates attesting to the award of the US Army organizational decorations which they have been awarded.

## CHAPTER 11

### HISTORICAL PROPERTIES

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**11-1. General.** This chapter establishes the responsibilities, policies, and procedures for preserving, maintaining, and utilizing historical properties in order to advance knowledge and understanding of the Army's heritage within the Army and among the American people.

**11-2. Explanation of terms.** *a.* "Historically significant items" comprise historical properties and other articles of historical significance not specifically designated as historical properties. Historically significant items include but are not limited to weapons, military equipment, articles of uniform or personal equipment, flags, works of art, unit and individual decorations, battle streamers, and all other objects, except official records, which constitute relics or evidence of battle experience or other military activity of local or national significance to the United States or foreign armed forces. An item may have historical significance because it is associated with important persons, events, or places, because of ancient or traditional association with a military organization, or because it is a representative example of obsolete equipment. Athletic trophies, prizes, unit awards, and other items of transitory significance or not pertinent to the battle history, lineage, or traditions of the owning agency or of the United States or foreign armed forces, or to military history in general, are not considered to have historical significance within the meaning of this regulation.

*b.* "Historical properties" are historically significant items that have been designated historical properties by the Chief of Military History, an installation commander, or by a commander of a military organization (para 10-2d).

*c.* "Organizational historical properties" comprise historical properties in the custody of, or of unique significance to, particular organizations.

*d.* "War art" comprises paintings, drawings, sketches, cartoons, or sculptures depicting military activities or expressing the artists' interpretation of reaction to war or other military activities. Items of war art should normally be designated historical properties.

*e.* The "Army Art Collection" is all art in the custody of or under the control of the Chief of Military History.

*f.* A "historical collection" comprises an assortment of historical properties pertaining to the history of or in the custody of a particular organization, installation, or agency.

*g.* The "Army Historical Collection" is the historical collection under control of the Chief of Military History, including historical properties in the custody of installations, organizations, or agencies.

*h.* An "Army museum" is a historical collection, registered with the Chief of Military History (as required by para 11-4c), and housed in specifically designated rooms or buildings in the care of one or more persons designated as curators or custodians. A museum may be established by any Army agency or activity.

*i.* An "installation museum" is an Army museum operated by, or in conjunction with, either an installation or an activity more or less permanently located at an installation.

*j.* An "organizational museum" is an Army museum operated by, or in conjunction with, an agency, major command or other organization.

k. The "Army Museum System" comprises those installations and organizational museums registered with the Chief of Military History as Army Museums.

l. The "Central Catalog of Historical Properties" is a consolidated catalog maintained by the Chief of Military History, recording items of all Army museums and historical collections, as well as all other historical properties in the custody of installations or organizations.

**11-3. Responsibilities.** a. The Chief of Military History is responsible for control of all historical properties, including their identification, designation, maintenance, classification, cataloging, loan, transfer, and disposition; staff supervision of the Army Museum System; guidance to Army agencies and activities regarding the use of historical properties; preservation as historical properties of representative examples of obsolete military equipment; and preservation, maintenance, and management of the Army Art Collection.

b. Commanders of major Army commands are responsible for coordination and staff supervision of the Army Museum System and historical properties activities within their commands under the staff supervision of the Chief of Military History. Policy and procedural matters will flow through command channels, while technical matters, such as those concerning the designation, cataloging, maintenance, accountability, utilization, and presentation of historical properties, will flow directly from installation or unit commanders to the Chief of Military History.

c. Commanders of overseas Army component commands are also responsible for—

(1) Informing the Chief of Military History through the CONUS Army Central Activity of those items of historical property, including items of modified US equipment, which are being held overseas for return to CONUS (para 11-6d).

(2) Informing the Chief of Military History through the CONUS Army Central Activity of those items of captured enemy equipment and other foreign material from which

the Chief of Military History may request items for historical use.

d. Commanding General, US Army Materiel Command is responsible for—

(1) Keeping the Chief of Military History informed of types of equipment which have been declared obsolete, in order that representative examples can be designated historical properties.

(2) Keeping the Chief of Military History informed of cases within the cognizance of the Commanding General, US Army Materiel Command in which equipment has been developed or modified to meet the operational requirements of a particular theater or area. The Chief of Military History will request that theater commanders designate significant representative examples of such equipment as historical properties.

(3) Providing, within available resources, maintenance and storage of historical properties placed in his custody.

e. Installation commanders are responsible for locating and identifying historically significant items and designating them as historical properties under the procedures of paragraph 11-6; for classification, cataloging, utilization, security, and maintenance of historical properties, for maintaining property accountability, and for support of museums and historical collection activities.

f. Commanders of military organizations are responsible for locating and identifying historically significant items of particular significance to their organizations, and, subject to approval of the installation commander, for designating such items as organizational historical properties under the procedures of paragraph 11-6. In overseas commands, commanders of military organizations not stationed at an installation may designate historical properties (under the procedures of para 11-6), except that large items such as tanks, trucks, artillery pieces, etc., will be designated as historical property by an organizational commander subject to the approval of the Commanding General of the major command of which the organization is a part.

g. The commanders of oversea Army component commands are responsible for surveying the list of available captured or other foreign materiel before it is reported to the CONUS Army Central Activity in order that items of special historical significance may be noted as candidate historical properties when lists are forwarded.

#### 11-4. Historical collections and museums.

Commanders of installations, organizations, and agencies are authorized to acquire historical collections and to establish museums to house, preserve, maintain, display, and account for historical properties in their custody. Historical collections should be specialized and limited in scope so as to focus upon the history of an installation, organization, arm, branch, weapon, activity, or historically significant person or event; or to serve a specific purpose, such as education, training, research, fostering esprit, or enhancing community relations. *Curators are encouraged to trade to other museums items having greater significance and appropriateness to those museums, in exchange for items that are more significant and appropriate to their own museums.*

a. No criteria for the size, scope, type, or composition of historical collections required to justify establishment of an Army museum are prescribed by the Department of the Army.

b. An organization commander or head of an activity desiring to establish a museum will request approval of the commander of the installation at which the museum will be located.

c. Each Army museum will be registered with the Chief of Military History. The following information will be submitted through command channels with notice of establishment:

- (1) Name of museum.
- (2) Sponsoring agency.
- (3) Installation at which located.
- (4) Purposes or uses which museum is expected to serve.
- (5) General nature, size, scope, and composition of historical collection.

(6) Nature and extent of interest or support from nonmilitary agencies.

(7) Type, size, and location of buildings, room, or area to be used as a museum.

(8) Description of staff, including names and grades of the director, or officer-in-charge, and the chief curator.

(9) Source of financial support, e.g., training funds, overhead funds, nonappropriated funds.

(10) Museum hours and whether museum is open to the general public.

d. An Army museum will not be closed for any period in excess of 90 days, and the collection of such museum will not be stored without written notification to the Chief of Military History at least 30 days in advance of such action. Such notification will include the reasons for the temporary closing, an estimate of the time the museum will remain closed, and the physical location of the collection during the inactive period.

e. No permanent closing of an Army museum will be effected without written notification to the Chief of Military History at least 90 days in advance of such contemplated closing. Following receipt of such notification the Chief of Military History will furnish the installation or organization commander disposition instructions for the historical properties of the museum being closed.

**11-5. Support of historical collections.** a. *Installation Commanders.* Installation commanders are authorized to provide support to installation and organization museums and other historical collections to include—

- (1) Use, renovation, repair, and maintenance of buildings.
- (2) Upkeep of grounds.
- (3) Provision of utilities and telephone service.
- (4) Maintenance of historical properties.
- (5) Construction or provision of display cases and similar materials.
- (6) Sign painting and similar service.
- (7) Coordination of information services.

(8) Security of grounds, buildings, and historical collections, including construction, hiring of guards, fire protection, and other security measures.

(9) Printing of announcements, brochures, and other materials.

(10) Employment of curators and other museum personnel.

(11) Travel in connection with museum activities.

(12) Cost of insurance on historical items not owned by the Federal Government which have been placed on loan to a museum or historical collection.

(13) Transportation of historical properties and related supplies and equipment.

(14) Expendable and nonexpendable supplies.

(15) Postal, clerical, and secretarial services.

(16) Costs of participation in off-post historical activities.

(17) Assignment of personnel to full- or part-time curatorial duties.

(18) Authorization and use of nonappropriated funds in support of museum or other historical collection activities, subject to provisions of b(2) below.

(19) Procurement of historical properties.

(20) Other activities that contribute to the accomplishment of the museum's mission.

*b. Funds.* Support of historical collections may be obtained from appropriated or nonappropriated funds or from private associations. Eligibility for support from appropriated or nonappropriated funds depends upon the purpose for which the historical collection is operated and the personnel it is intended to serve.

(1) Appropriated fund support of historical collections, the primary function of which is to serve an authorized training, research, public relations, morale, or recreational activity, may be furnished in accordance with AR 210-55.

(2) The use of nonappropriated funds (AR 230-5) is authorized to support historical collections as follows:

(a) Nonappropriated unit funds may be used within the limitations of AR 230-1.

(b) Nonappropriated military welfare funds (major command, central post, and unit) may be used to supplement appropriated funds for support to historical collections whose primary purposes are to serve morale, recreational, and welfare activities of military personnel and their dependents.

(c) Commandant welfare funds established pursuant to AR 230-43 may be used to supplement appropriated fund support of historical collections administered in conjunction with service schools at which such nonappropriated funds are established.

(d) Nonappropriated sundry funds established for the specific purpose of receiving voluntary contributions, service charges, dues, and other income for support of historical collections, may be expended for such purposes. See AR 230-5 and AR 230-60.

(3) When a source of funds, such as private donations, or proceeds from sale of souvenirs, is available, establishment of a sundry association fund as prescribed by AR 230-5 may be appropriate. Utilization of sundry or association funds will be consistent with the purposes for which income is received.

(a) Installation commanders are authorized to approve acceptance by sundry or association funds of unconditional donations not greater than \$1,000 from private associations or individuals. Major commanders may authorize the acceptance of such donations exceeding \$1,000 but not greater than \$10,000. Request for approval of acceptance of larger donations will be submitted to Deputy Chief of Staff for Personnel, Department of the Army, THRU: Chief of Military History (see AR 230-5).

(b) Utilization of sundry or association funds is authorized by activities receiving appropriated fund support. Expenditure of welfare funds in support of sundry or association fund activities is not authorized.

(4) Private associations may be authorized to operate on military installations and in accordance with procedures and within the limitations prescribed by AR 230-5. Offers by private associations to construct or provide fi-

financial support of museums or otherwise contribute to historical collection activities may be accepted. Offers of donation of money or real or personal property will be submitted to the Secretary of the Army, THRU: The Chief of Military History and the Deputy Chief of Staff for Logistics (see AR 1-100).

*c. Personnel.* Staffing of Army museums and administration of historical collections will be in accordance with the Department of the Army personnel utilization policies.

(1) The staffing guidance provided in Department of the Army Pamphlet 20-551 will be employed for the operation of all Army museums (as defined in para 11-2 of this regulation). Installation commanders are, in addition, authorized to provide civilian personnel positions for organizational museums.

(2) Manpower space requirements for installation, research activity, service school, and organizational museum staffs must be substantiated in accordance with manpower management policies as established by AR 570-4. Requirements must reflect minimum staffing to allow mission accomplishment.

(3) Military personnel may be utilized in museums and in administration of historical collections on a part-time basis as an additional duty to their primary duties. Military personnel normally will not be used to perform these functions on a full-time basis.

*d. Space allocation.* Installation commanders are authorized to allocate available buildings for use by installation or organizational museums.

*e. Construction.* Construction of museum facilities will be subject to provisions of AR 415-15, AR 415-35, and AR 210-55. All such facilities will be subject to the provisions of DOD Construction Criteria Manual 4270.1-M and supplementing TM 5-800-1 as to authorization for exception to space allowances.

**11-6. Acquisition of historical properties.** Commanders are encouraged to add to their historical collections items meeting the criteria of the definition of historical properties in paragraph 11-2. Historical properties may

be acquired by donation, designation, transfer, loan, or purchase.

*a.* Procedures for acquisition through donation are prescribed by AR 1-100, AR 230-5, and in paragraph 11-5b(3). Reasonable conditions may be attached to donations of historical properties. Reasonable conditions include incorporation of the property into a specified collection, display of several properties as a set, identification of the donor in captions or explanatory literature, and similar stipulations. No condition likely to hinder an agency or activity in accomplishment of its mission will be accepted. Questions regarding proposed conditions of doubtful acceptability will be referred to the Chief of Military History.

*b.* Items of obsolete equipment may be designated historical properties. Items of equipment currently in service will be designated historical properties only when specifically associated with important persons, events, or places. Organizational commanders having custody of such historically significant items will submit written or verbal requests with full justification for their designation as historical properties to the commander of the installation at which the properties are located. In the case of organizations not located on an installation, requests for designation of items as historical properties will be submitted to the installation commander who will have maintenance responsibility.

*c.* Items of captured enemy equipment and other foreign materiel may be designated as historical properties subject to satisfaction of values and priorities for captured items as established in AR 755-2. Captured items not required for other purposes, such as for technical and intelligence exploitation, or training, or items which have been used for such purposes and are no longer required as confirmed through procedures established in AR 755-2, may be designated as historical properties. Organizational and installation approval procedures as specified above will apply.

*d.* Historical properties, including items of standard US equipment modified to meet the requirements of the battlefield which are excess

to current requirements, will at the request of the major oversea command historian be tagged, evacuated, stored, reported, shipped, and otherwise processed in the same manner as that prescribed for captured enemy equipment and other foreign materiel, as defined in AR 755-2. Such historical properties may be stored at a depot to be designated, subject to the availability of resources, by the Commanding General, US Army Materiel Command when installations or organizations for which properties were earmarked have not immediately available the necessary funds for packing, crating, handling, and shipping. However, commanders in an oversea theater may at the request of CONUS installation or organization commanders elect to return historical properties direct to such installations or organizations in CONUS, provided that funds for packing, crating, handling, and shipping are furnished.

e. Installation or organizational commanders may lend or transfer historical properties between historical collections under Army control, provided both parties agree to the transaction and the Chief of Military History approves. Any such request for loan or transfer will include the following:

(1) Identification of the historical properties to be lent, donated, or exchanged by item and catalog number.

(2) The number of like items in the donor's or lender's collection.

(3) The duration of the proposed loan.

(4) Statement of acquiescence to proposed loan or transfer by the lender (or donor), or by both parties in the case of proposed exchanges.

(5) Justification of the proposed loan, donation, or exchange as being in the best interest of the Army.

f. The Chief of Military History normally will approve requests for mutually acceptable exchanges of property between historical collections under Army control. Requests for authorization of donations to other agencies of historical properties which are not excess to the needs of the Army Museum System as a whole will not be approved.

**11-7. Accountability.** a. Accountability for historical properties, other than those owned by nonappropriated funds, will be maintained in accordance with the provisions of AR 735-5. Accountability for property procured or owned by nonappropriated unit funds will be as prescribed by AR 230-21. Property procured or owned by nonappropriated sundry funds will be accounted for as prescribed by AR 230-65. The Historical Property Catalog (DA Form 2609) serves as both museum catalog and property account. An annual inventory will be made of all historical properties.

b. Since most historical properties are irreplaceable, extreme care will be exercised to prevent their loss, damage, or destruction. Loss, damage, or destruction of appropriated fund property will be accounted for in accordance with procedures prescribed by AR 735-10 and AR 735-11. A copy of each final approved Report of Survey (DD Form 200), report of investigation, report of board of officers, or certification of loss through fair wear and tear pertaining to historical properties will be forwarded through command channels to the Chief of Military History, ATTN: MH-SP, Department of the Army. Loss, damage, or destruction of nonappropriated fund property will be investigated and processed, as prescribed by AR 230-8. Losses or thefts of firearms, as well as their recovery, will be reported by museum curators in accordance with AR 190-6.

**11-8. Disposition of historical properties.** In no case will historical properties be disposed of without written approval of the Chief of Military History. Salvage, loan, or donation of historical properties will be accomplished in accordance with the provisions of AR 755-1, AR 755-2, and DOD 4160.21-M (Defense Disposal Manual). In addition, loan of historical properties to the US Navy or Air Force or other branches or departments of the United States Government will be in accordance with the provisions of AR 735-5.

a. Agencies authorized by chapter III, part 3, DOD 4160.21-M to receive loans or donations of historical properties may submit re-

quests to custodians of collections that include the desired items. Such requests will comply with the requirements of section O, chapter III, part 3, DOD 4160.21-M. If the requested items are excess to the needs of the proposed lender's or donor's collection and the donation or loan is considered to be in the best interest of the Army, the request will be forwarded to the Chief of Military History for final approval, including the information required by paragraph 11-6e, as well as the following:

(1) Eligibility of the receiving agency under the criteria of section O, chapter III, part 3, DOD 4160.21-M.

(2) One copy of each of the certificates required by section O, chapter III, part 3, DOD 4160.21-M.

b. Agencies desiring to dispose of historical properties by salvage will request approval of the Chief of Military History. Requests will contain identification of the historical property by item and catalog number and justification for the proposed disposition.

c. Commanders of installations, organizations, or agencies organized under tables of distribution which are scheduled for disbandment or discontinuance will submit, by electrical means, requests for disposition instructions for their historical properties to the Chief of Military History, ATTN: MH-SP, Department of the Army, immediately upon notification of such scheduled disbandment or discontinuance. Such request will include the catalog numbers of those historical properties on which Historical Property Catalog Cards have been forwarded to the Office of the Chief of Military History, as well as the quantity and general identification of any historical properties on which the requirements of paragraph 11-9c have not been met.

**11-9. Cataloging.** Historical properties will be cataloged as soon as practicable after receipt. Accuracy and thoroughness are particularly important since descriptive or identifying data, once inaccurately transcribed, is unlikely to be corrected. Unambiguous and consistent terminology should be employed.

a. Classification, which is the systematic di-

vision of a historical collection into categories, facilitates the use of a collection for reference and research, and aids in management. Classification is mandatory for museums and large collections. A typical classification system for general museums is included in appendix B.

b. Each historical property is numbered separately. Care must be exercised in marking to avoid damage.

c. Historical Property Catalog cards (DA Form 2609) constitute the prime record of all items in a collection of historical properties. A Historical Property Catalog card will be completed in duplicate for each historical property. The original will be forwarded to the Chief of Military History, ATTN: MH-SP, Department of the Army. The duplicate will be retained by the custodian of the collection to serve as a catalog and as the property record required by AR 735-5 and AR 230-21 or AR 230-65, as appropriate. All significant facts concerning the physical characteristics, history and location of each historical property will be noted on the catalog card. Instructions for completion of the Historical Property Catalog Card are included in appendix C.

d. A historical property jacket consisting of a manila folder or other container will be maintained for each historical property for which records are too extensive to be included on the Historical Property Catalog card. The historical property jacket will contain pertinent bibliographies, field notes, working notes, exhibition information, repair reports, research information, and correspondence. Such jackets are for the use of the museums and historical collections, and will not be forwarded to the Chief of Military History.

e. Historical properties held on loan indefinitely or for periods exceeding 1 year are cataloged in the same manner as those in permanent custody.

f. Photographing of all historical properties is desirable and is especially recommended for objects such as uniforms and works of art that are subject to deterioration. Color photography often preserves a more complete and

accurate record than black and white. Photographic prints and negatives should be included in jacket files. Notation of the existence and location of photographs, replicas, models, and casts should be included on Historical Property Catalog cards.

**11-10. Maintenance.** Historical properties will be maintained in accordance with standard museum procedures.

a. The custodian of a historical collection should obtain and utilize a library of standard reference works appropriate to his collection. Each library should contain a book on care of historical properties. Libraries of large collections should contain manuals on cataloging and marking. References on more specialized subjects, such as care of art works or identification of particular categories of historical properties, may be included as appropriate.

b. Special maintenance problems will be brought to the attention of the Chief of Military History.

**11-11. Display.** Historical collections intended primarily to appeal to the general military or civilian viewer will be displayed in a manner to attract and hold attention and to present a comprehensive picture of some aspect of military activities or the development of some phase of military history. Historical collections intended to serve a training or other special purpose will be displayed to accomplish that objective. Loan of historical items for display purposes in the civilian domain will be governed by the provisions of AR 360-61.

**11-12. Custody of organizational historical properties of Combat Arms Regimental System units.** a. Pending establishment of regimental headquarters, the organization historical properties of an active regiment will be shipped to and held in custody by the lowest numbered or lettered active organization of the regiment. Upon establishment of regimental headquarters these properties will, upon request of the regimental commander, be transferred to regimental headquarters to become a part of a regimental display or to be

lent for safekeeping and display to subordinate units of the regiment.

b. When an element of a regiment that has custody of the regimental organization historical properties is inactivated or disbanded, historical properties will be shipped to the lowest numbered or lettered active element of the regiment. Subsequent activation or reactivation of a lower numbered or lettered element normally will not be the basis for transfer of the organizational historical properties to the lower numbered or lettered organization.

c. The commander of the organization having custody of the organizational historical properties of the regiment may retain full custody or he may lend them for safekeeping and display to other active organizations of the regiment.

d. The Chief of Military History will determine entitlement of active organizations to historical properties stored by previously disbanded or inactivated organizations.

**11-13. Storage of organizational historical properties.** a. A TOE organization may place historical properties in storage at government expense at the New Cumberland Army Depot, Harrisburg, Pa. 23219, for either of the following reasons:

(1) Inactivation or disbandment of the organization.

(2) Movement of the unit under circumstances that render continued custody of historical properties impractical.

b. The commander of an organization desiring to store historical properties will submit a request for approval of storage to the Chief of Military History, ATTN: MH-SP, Department of the Army, stating the reasons why storage is required. Requests will be submitted immediately upon notification of scheduled disbandment, inactivation, or movement of the organization.

c. Each historical property will be labeled or tagged with the following information: nomenclature and catalog number of the item and identification of the owning organization. Shipping container or outside package will be

marked "organizational historical properties" and will identify the owning organization.

*d.* Items not meeting the criteria for historical properties according to the definition in paragraph 11-2 will not be stored as historical properties. Disposition of the following categories of property will be in accordance with the regulations indicated:

(1) Historical files, unit histories, and similar documents: AR 340-2 or AR 340-18-2.

(2) Flags, colors, guidons, battle streamers, fourrageres, lanyards, and similar items: AR 840-10.

(3) Athletic awards, prizes, awards for unit competition, and unit fund property: AR 230-1 and AR 740-13.

(4) Property of field organizations preparing for oversea movements: AR 220-10.

*e.* DD Form 1384 (Transportation Control and Movement Document) will be prepared for each container. Historical properties will be identified thereon by nomenclature and catalog number. The original card will be affixed to outside of shipping container or package in a waterproof envelope. Copies will be distributed as follows:

1—Accompany with request for approval of storage submitted to the Chief of Military History.

1—In the shipping container.

1—With organizational property records.

1—With organizational historical records.

*f.* Organizations may withdraw historical properties from storage by submitting a request to the Chief of Military History, ATTN: MH-SP, Department of the Army.

**11-14. Art Exhibits.** The Chief of Military History maintains and administers the Army Art Collection for the purpose of contributing to knowledge and appreciation of military history on the part of members of the armed forces and the general public.

*a.* Various traveling exhibits of war art are available for temporary loan to interested public and private organizations which agree to display the art publicly in accordance with

conditions prescribed by the Department of the Army.

*b.* Requests for information concerning available war art exhibits should be directed to the Chief of Military History, ATTN: MH-SP, Department of the Army, Washington, DC 20315.

*c.* The borrower shall be responsible for any and all expenses incident to the loan, including packing, crating, local transportation, and shipping expenses for both shipment to the borrower and return to the destination directed by the Chief of Military History. On any loan to other than a Federal government agency the borrower must furnish a surety bond, at its own expense, indemnifying the Government against theft, loss, damage, or destruction of the exhibit.

**11-15. Annual Inventory.** An inventory of all military art and other historical properties on loan from the Office of the Chief of Military History will be made by the borrower on DA Form 3161 (Request for Issue or Turn In) on 1 November of each year. A statement noting any damage or deterioration to the borrowed property will be submitted with the annual inventory. The completed and signed DA Form 3161 will be sent to the Chief of Military History.

**11-16. Transportation of historical properties.** *a.* Historical properties to be shipped will receive minimum military packing and packaging as described in AR 700-15. Methods of packing and packaging are described in TM 38-230.

*b.* Funding of commercial transportation within CONUS will be in accordance with the provisions of AR 37-7.

**11-17. Archives.** Archives and other documents maintained in Army museums for research and reference will be administered in accordance with either AR 340-1 or AR 340-2, as appropriate. Classified documents will be safeguarded in accordance with the provisions of AR 380-5. Documents normally are not designated historical properties. Special problems regarding documents will be referred to The Adjutant General.

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## CHAPTER 12

### HISTORICAL SERVICES

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**12-1. General.** This chapter establishes the responsibilities, policies, and procedures for providing historical research and reference services which are not covered in the other chapters of this regulation.

**12-2. Responsibilities.** *a. General.* The primary mission of the Army Historical Program is to provide documented military history to meet Army requirements. Other public and private agencies as well as individual citizens may obtain information concerning the Army's contribution to the Nation's heritage, but the services to these groups are limited by regulations regarding classified material and by the number and capabilities of personnel assigned to historical research and writing projects within the Program.

*b. Specific.* The Chief of Military History is responsible for furnishing Army staff agencies with historical services as outlined in paragraphs 12-3 through 12-7. Staff historical offices and staff historians are similarly responsible for furnishing these services within the commands in which they are located. Requests for any service beyond their immediate capabilities will be referred directly to the Chief of Military History.

**12-3. Staff support.** This service consists of providing organized and reliable historical information on specific subjects that will as-

sist in staff planning, preparation of studies, and execution of programs.

**12-4. Information service.** This service consists of providing historical research and furnishing information in response to official and unofficial inquiries which fall primarily within a commander's specific area of interest. AR 360-5 will govern the release of this type of historical data.

**12-5. Reference service.** This service consists of directing official and unofficial inquiries to the appropriate agency or to an archival source of historical data which are within a commander's immediate area of interest. When extensive research is required to answer inquiries from a private source, referrals to the custodian of original documents or to a bibliography of secondary works will be made.

**12-6. Advisory service.** The Office of the Chief of Military History will provide technical service to public or private agencies when deemed by the Chief of Military History to be in the interest of the Department of the Army.

**12-7. Review service.** Professional historical review of manuscripts prepared by private individuals, activities, or agencies will not be undertaken, except when specifically authorized by the Chief of Military History.



## CHAPTER 13

### HISTORICAL RECORDS AND SOURCE MATERIAL

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**13-1. General.** *a.* This chapter establishes the responsibilities, policies, and procedures for the use of official records of the Department of the Army for historical purposes.

*b.* The official records of US Army military operations and activities are the basic source material utilized in the preparation of the official histories of the US Army.

*c.* The value and reliability of the historical works prepared by the Department of the Army depend upon a full knowledge of the information contained in the Department's records. Army historians will have access to official records pertinent to their official duties, subject to the restrictions outlined in this regulation, the provisions of regulations cited herein, and the provisions of regulations governing the safeguarding of defense information.

*d.* The provisions of AR 380-5 govern the copying, extracting from, or reproduction of classified documents. However, the taking of notes by Army historians for historical purposes from classified documents originating in the Department of the Army will not be interpreted as reproduction within the meaning of that regulation. Any notes taken for historical purposes will be handled in accordance with the provisions of AR 380-5.

**13-2. Explanation of terms.** Historical records and source material are defined as all records, manuscripts, diaries, interviews, publications, maps, photographs, and recorded and microcopied material.

**13-3. Responsibilities.** *a.* The Adjutant General is responsible for the formulation of policy and staff direction of records administration, to include the retirement of historical records

and source material, in the Department of the Army (AR 340-1, 340-2, and AR 340-18-1 through 340-18-16).

*b.* The Chief of Military History is the principal advisor to The Adjutant General on the historical adequacy of the Army Records System.

*c.* Commanders at all echelons are responsible for the collection and retirement of historical records and source material as provided for under AR 340-18-2 and AR 340-2.

*d.* The Chief of Military History is responsible for designating those Army historians who may be granted access to special files, as outlined in paragraph 13-4, and for granting access to original manuscripts of Army staff historical offices for unofficial historical research.

*e.* Commanders with staff historical offices are responsible for forwarding all requests for access to original manuscripts of those offices for unofficial historical research to the Chief of Military History, Headquarters, Department of the Army for approval.

**13-4. Official access.** *a.* General policies and procedures for official access to Army records are specified in AR 340-1.

*b.* Except as provided in *c* through *f* below, and subject to the provisions of AR 380-5, Army agencies, commanders, and staff officers will give staff historians all information needed for accurate, complete histories of Department of the Army activities. This information will include pertinent material of any date regardless of classification. Examples are journals and journal files, operation orders, estimates, memorandums for record, correspondence, staff studies, diaries, minutes, sum-

maries of conferences, records of the phone calls, and oral statements. It is particularly important that key staff officers—division chiefs, directors, and deputy chiefs of staff—make basic data available to staff historians. Key officers should take necessary action to insure that information needed to meet historical program objectives is preserved in documentary form.

*c.* Official access by Army historians to the following special files is controlled and arranged with appropriate custodians by the Chief of Military History:

- (1) Intelligence files.
- (2) Counterintelligence files, when access is specifically directed by the Secretary of the Army.
- (3) Joint Chiefs of Staff files.
- (4) Combined Chiefs of Staff papers.
- (5) Other non-Army files requiring special permission for access.

*d.* Commanders whose historians desire access to the aforementioned files will forward a request for access, containing the following information to the Chief of Military History.

- (1) Name of historian.
- (2) Position held.
- (3) Project in which engaged.
- (4) Status of security clearance.
- (5) Date access desired.

*e.* Access will not be granted to officer personnel files maintained by The Adjutant General or to files of evidence obtained by the Office of The Inspector General from individuals on a confidential basis.

*f.* Personal correspondence of living officers not included in official records will not be con-

sulted without the permission of the officer in each case.

**13-5. Unofficial access.** *a.* General policies and procedures governing unofficial access to Army records for historical research are prescribed in AR 345-20 and AR 340-1. Requests for information contained in such records will be denied only on the grounds authorized in AR 345-20.

*b.* Historical records of the US Army's operations and the manner in which they were accomplished are public property, and except when the nation's security may be jeopardized, the right of citizens to the full story is unquestioned. Beyond this, the major achievements credited to the US Army are, in fact, accomplishments of the entire nation. The American public should find no unnecessary obstacle to access to the written record. While the official history of the US Army now being prepared is designed to tell, without reservation, the complete story of the US Army's participation, fully documented with references to the records used, preparation of this history does not constitute a reason or excuse for denying to the public immediate access to facts and records.

*c.* Individuals requesting unofficial access to records in an Army staff historical office which are borrowed from a records depository or other official custodian will be referred to the appropriate custodian of the particular records.

*d.* Requests for unofficial access to original manuscripts of an Army staff historical office will be handled as specified in paragraph 13-3*d.*

**13-6. Location.** Noncurrent records which have been retired by operating agencies will be located in one or more of the records centers listed in the appendix to AR 340-1.

## CHAPTER 14

### FIELD HISTORICAL OPERATIONS

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**14-1. General.** *a.* This chapter establishes the responsibilities, policies, and procedures for the conduct of field historical operations.

*b.* "Field historical operations" are those additional historical activities generated by combat or stability type operations in oversea theaters (para 14-6).

**14-2. Responsibilities.** *a.* The conduct of field historical operations is a command responsibility.

*b.* The Chief of Military History is responsible for the supervision of field historical operations.

*c.* Commanders at all echelons engaged in combat (Vietnam) or stability type (Dominican Republic) operations are responsible for the collection, maintenance, and retirement of historical records and source material of US Army operations.

**14-3. Operations concept.** *a.* Staff and operational historical assistance will be provided to oversea Army component commands engaged in combat (Vietnam) or stability type (Dominican Republic) operations in order to meet the additional requirements for field historical operations.

*b.* Military History Detachments will be employed to provide flexible staff and operational assistance required by field historical operations. Thus by attachment and detachment, staff and operational historical resources can be applied to—

(1) Advise commanders on the adequacy and completeness of the official records of combat, combat support, and combat service support operations in the combat zone and supporting areas for eventual historical research

(e.g., Operational Reports—Lessons Learned, journal, orders, plans, reports, estimates, interrogations, maps, photographs, and historical properties).

(2) Assist commanders in the obtaining of information, not normally appearing in other military records, through interviews, special historical studies, observations, photographs, and sketches.

**14-4. Organization.** *a.* Military History Detachments (TOE 20-17) are employed both to provide a staff historical office to specified organizations not having an organic staff section of that type and to supplement and provide flexibility for staff historical offices at higher echelons.

*b.* Normally in combat or stability type situations, at least one detachment is allocated to the theater army, the theater army support command, the theater army replacement and training command, the theater army civil affairs command, the theater army air defense command, each army group, each field army, each corps, and each division. Additional detachments may be allocated to the theater army to provide even greater flexibility in the management of special studies or other historical tasks, especially where the mobility of the detachments is hindered by the nature of the operations or where the nature of the operation indicates a broader historical coverage is required at the lower levels of command.

**14-5. Personnel.** Each military history detachment consists of two personnel, one an officer historian, the other an enlisted administrative specialist. The detachment serves the commander of the organization to which attached, in both a staff and operational capac-

ity, to include but not be limited to functions listed in paragraph 14-6.

**14-6. Functions.** The following listed historical duties constitute the major activities involved in field historical operations:

*a.* Advise on historical adequacy of journals and journal files (AR 220-15) and other records categories required for historical purposes.

*b.* Advise on historical adequacy of section I of the Operational Report—Lessons Learned (AR 525-15).

*c.* Advise on matters pertaining to historical properties. See paragraph 11-2 for classification criteria; see also paragraph 92, AR 735-5 and paragraph 182, Manual for Courts-Martial.

*d.* Conduct personal interviews of commanders, staff officers, and other personnel.

*e.* Record observations relative to weather, morale, fatigue, and physical condition.

*f.* In coordination with AG records management personnel and unit adjutants, advise on

the content, retention, and retirement of records so as to assure the documentation of US Army combat operations or stability type situations.

*g.* Prepare special historical studies.

**14-7. Procedures.** *a.* Field historical operations will be conducted in accordance with professional procedures specified by the Chief of Military History.

*b.* In the conduct of field operations, military historians are authorized to collect, preserve, and forward copies of documents of significant historical value, including maps and photographs, which may be used in current historical research, directly to the Chief of Military History. Personal papers of key personnel which might not be retired through regular channels and taped interviews may also be forwarded direct to the Chief of Military History. The security classification along with any restrictions on the use of material contained in personal papers and taped interviews should be determined by the author or interviewee and clearly indicated when items are forwarded.

## CHAPTER 15

### US ARMY MILITARY HISTORY RESEARCH COLLECTION

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**15-1. General.** *a.* This chapter establishes the responsibilities, policies, and procedures for providing historical research and reference services in the field of military history at the US Army Military History Research Collection, a class II activity of the Office of the Chief of Military History located at Carlisle Barracks, Pennsylvania.

*b.* The objective of the facility is to establish a repository for the collection and preservation of historical materials relating to the United States Army, to facilitate the use of these materials to meet official needs and the needs of the military and civilian scholars in their conduct of research, and to preserve and perpetuate the traditions and heritage of the Army by appropriate activities including public displays relating to the history of the Army and its leaders.

**15-2. Responsibilities.** *a.* The US Army Military History Research Collection was established as a class II activity of the Office of the Chief of Military History on 1 January 1970.

*b.* The Commandant, US Army War College/Commanding General, Carlisle Barracks is designated as the Commanding General of the US Army Military History Research Collection.

*c.* The US Army Military History Research Collection will be governed by AR 870-10.

**15-3. Use of the Collection.** The Collection is the first facility within the United States Army which maintains an extensive collection of works that relate exclusively to the military profession. Since the facility encourages distinguished personages to donate to the Army their personal works or collections which

would substantially assist in the development of the history of the Army, the material in the Military History Research Collection will be used to meet official requirements for historical information and will be open to all military and civilian scholars for the conduct of unofficial research. Requests for access to classified materials will be processed in accordance with AR 340-1.

**15-4. The Bradley Foundation and Museum.** *a. General.* In addition to housing one of the nation's largest military history collections, the US Army Military History Research Collection was merged with the Omar N. Bradley Foundation on 8 May 1970.

*b. The Foundation.* In late 1968, General of the Army Omar N. Bradley offered his personal papers and memorabilia to the Army. In accepting General Bradley's offer, Secretary of the Army Stanley R. Resor directed that the papers become a part of the US Army Military History Research Collection and that an interpretive exhibit be developed to portray General Bradley's career in the Army and contributions to the nation. The Bradley papers are now an integral but separate part of the overall Military History Research Collection.

*c. The Museum.* The earlier exhibit initiated at the direction of the Secretary of the Army, has now become the Bradley Museum incorporated with the Research Collection at Carlisle Barracks, Pennsylvania.

**15-5. Donations to the Research Collection.** In response to field inquiries regarding offers of donations to the Military History Research Collection, the following guidance on welcomed contributions is offered:

*a.* All personal papers and other correspondence of a personal nature.

b. Copies of all types of published material, books, articles, or other literature related to a specific project, era, or span of command would be valuable to the Collection.

c. Books on the subject of military history, particularly rare and unusual works.

d. Photographic coverage including motion picture reels of the donor with American and/or foreign officials in ceremonies and official acts such as conferences—national and/or international—and other photographs of unusual historical significance.

e. Tape recorded interviews and transcriptions of interviews as well as recorded minutes of conferences or transcriptions of conferences, national or international, or other significant conferences would be a welcomed addition.

*Note.* Weapons or war trophy firearms, plaques, statuary, paintings, and items of furniture or nicknacks should *not* be sent to the Military History Research Collection. Questions from donors concerning such contributions may be directed to the Office of the Chief of Military History, ATTN: MH-SP, Department of the Army, Washington, DC 20315.

**APPENDIX A**  
**GUIDE TO THE PREPARATION OF THE ANNUAL**  
**HISTORICAL SUMMARY**  
**Reports Control Symbol CSHIS-6(R2)**

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**A-1. Purpose.** This guide is provided to assist staff historians in preparing the annual historical summary of agencies designated in chapter 8 and to establish minimum standards of uniformity in the preparation of summaries.

**A-2. General.** *a.* The annual historical summary should be a unified narrative report of the activities of an agency as a whole or a collection of monographs covering topics selected as most important. It should not be a mere collection of feeder reports from the agency's subdivisions. However, staff agencies that are functionally organized may find it desirable to shape their summaries into chapters or sections corresponding to the division of functions among major subdivisions of the agency. If either this or the monograph is used, there should be an introduction summarizing significant organizational changes and major trends and developments that will provide a measure of unity to the entire summary.

*b.* The annual historical summary serves many purposes. It is an important source of information for historians writing definitive histories; it assists the agencies in orienting new officers; it provides action officers with background information on continuing problems; and it helps make the staff officer aware of the historical importance of his work.

**A-3. Selection of developments and events.** *a.* The developments and events selected for inclusion in the summary should be those of importance to the Army and the nation and not those involving matters of routine administration and housekeeping.

*b.* Criteria must be established by which to identify major developments and events. Giving major and minor matters equal emphasis obscures the importance of major items and their effects.

*c.* The selection of topics is a continuing process for the staff historian preparing the summary. During the course of the year he should maintain a file covering the major events and developments in the agency's work. At the close of the reporting period he will then have a working file of supporting documents dealing with the major topics.

*d.* The security classification of defense information will not be a barrier to reporting significant developments. Guidance for handling the treatment of classified information is contained in AR 380-5. Whenever the summary is given wide distribution, the classified material may be appended as annexes and forwarded on a need-to-know basis.

**A-4. Treatment of major developments and events.** *a.* The summary should be clear, concise, and complete, with emphasis on the events and developments which have had a major impact on the policy, organization, and functions of the agency. It should be supported by such data and references as are necessary to make the account of these developments and events meaningful.

*b.* In treating the developments and events selected, the summary should be substantive in nature and deal objectively with the areas under consideration. It should include the background of and reasons for major policy decisions, courses of action considered as well as

those taken, and, wherever possible, an analysis of the results. The impact of decisions taken by higher authority and pertinent legislation by Congress should be noted. The narrative should include as much interpretation as the writer is in a position to make. It should not be conceived as a defense of the actions taken by the reporting agency or the Department of the Army.

c. Where the activities of a command or staff organization seem best suited to such treatment, the narrative should concentrate on an objective analysis of trends in operations and on judicious evaluations of changes in missions, requirements, procedures, organization and performance, and on the relationship between objectives, resources, policies, and accomplishments. Where appropriate, as in logistical organizations, comparative quantitative data should be used for these purposes. The annual summary should not, however, be used as a means of compiling or assembling detailed technical or project data more appropriate to scientific, technical, project, or project review reports.

**A-5. Source material.** *a. Citations.* An important part of the summary is the citation of sources of information. Citations should include a clear identification of the records used.

*b. Sources of information.* Each reference should clearly identify the source document as to kind, originating element, date, and subject, or the best estimate concerning any one of these missing from the document. Some examples of source documents are as follows:

- (1) Official correspondence and memorandums for the record.
- (2) Minutes of conferences.
- (3) Past annual historical summaries.
- (4) Other periodic reports of various types.
- (5) Interoffice memorandums.
- (6) Agency directives.
- (7) Public information releases.
- (8) Fact sheets and briefings prepared for visitors.

**A-2**

(9) Newspaper, periodical, and survey journal reports.

(10) Special studies conducted by the agency.

(11) Results of inspection trips—observations recorded by personnel.

(12) Reports or studies on projected plans and operations.

(13) Personal interviews.

**A-6. Format of the annual summary.** *a.* The annual historical summary may be typed or reproduced. When typed it will be bound in a folder-type cover.

*b.* Either legal (8" x 13") or correspondence (8" x 10 1/2") size paper may be used.

*c.* The title, Reports Control Symbol, submitting agency, and fiscal or calendar year covered will be placed on the cover as indicated in the following example:

ANNUAL HISTORICAL SUMMARY  
(RCS CSHIS-6(R2))

OFFICE OF THE  
JUDGE ADVOCATE GENERAL  
1 July 1971 to 30 June 1972

*d.* Left margin should be 1 1/2 inches. Top, bottom, and right margins should be 1 inch.

*e.* The same information as specified in *c* above will be placed on the title page.

*f.* In some instances a preface, foreword, or introductory remarks may be desirable. They will be titled as such and inserted before the table of contents.

*g.* The summary will include a table of contents showing the major headings, subheadings, and appropriate page numbers.

*h.* A separate list of charts, graphs, and illustrations will be prepared.

*i.* If terms and abbreviations are used which are common to the submitting agency but unfamiliar to other personnel, a glossary of terms will be placed at the end of the report.

*j.* Footnotes may be placed at the bottom of the page with a typed line to separate them

from the text, interlinearly immediately following the statement to which they refer, or consolidated at the end of a chapter or section. An example of a footnote is shown on page 87, DA Pam 20-200.

k. Chapter IV, DA Pam 20-200 offers many helpful suggestions in the preparation of a historical report. It is recommended that the contents of the chapter be read in conjunction with this appendix.

l. The inclusion of copies of important documents to supplement the text is desirable but optional. Such documents, if properly selected, can be a valuable adjunct to the summary and obviate the necessity for detailed discussion of some developments, actions, and events in the text of the summary. Copies of documents of a routine nature which do not serve to illustrate or amplify textual treatment of important policy decisions, events, or developments should not be included.

**A-7. Some common deficiencies of annual historical summaries.** a. *Lack of selective emphasis.* A shotgun report attempting to cover all the activities of the agency as well as the minutiae of normal administrative and opera-

tional routine places important and unimportant matters on the same level.

b. *Lack of substance.* In too many cases historical summaries make reference to decisions reached, papers prepared, memorandums or letters written, conferences held, and so forth, without indicating what the substance of these various actions was or how they related to the problems the agency was facing.

c. *Omission of controversial issues.* Whenever TOP SECRET or sensitive issues become involved, there is a pronounced tendency to sidestep reporting them. Paragraph A-3 is specific on those matters which are to be reported.

d. *Inclusion of agency jargon.* Uninhibited use of agency jargon, and of abbreviations without initial explanation by footnote or glossary, thwarts the reader and detracts from the clarity of the report.

e. *Omission of documentary references.* A report is not complete unless it is well referenced. The file number, title, and location of documents aid in further research efforts during the course of internal review by the submitting agency and in subsequent more detailed historical research.



## APPENDIX B

### SAMPLE CLASSIFICATION SYSTEM

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#### Artillery, Missiles, and Rockets

##### Fixed Artillery

Guns  
Howitzers  
Mortars

##### Mobile Artillery

Cannon  
Guns  
Howitzers  
Mortars

##### Missiles

Artillery  
Ballistic

##### Rocket

Rocket Launchers ("Bazooka")

##### Models

Artillery  
Missiles and Rockets

#### Shoulder Firearms

Pre-Flintlock Types (Hand cannon, matchlocks, wheel locks, snaphances)

##### Flintlock Types

Muskets  
Rifles  
Carbines  
Other (Wall guns, multishot, blunderbusses, shotguns, etc.)

##### Percussion Types

Muskets  
Rifles  
Carbines  
Other (Repeater, wall guns, shotguns, etc.)

##### Metallic Cartridge Types

Rifles  
Carbines  
Other (Shotguns, antitank rifles, etc.)

#### Machineguns and Automatic Shoulder Firearms

Early Types (Volley guns, nonautomatic machineguns)

#### Automatic Machineguns

Automatic Rifles  
Submachine Guns

#### Pistols and Revolvers

Pre-Flintlock Type  
Flintlock Types  
Percussion Types  
Metallic Cartridge Types  
Pyrotechnics  
Curiosa (Sleeve Pistols, sword pistols, lighters, etc.)

#### Bombs, Grenades, Torpedoes, and Mines

Bombs  
Bomb Fuzes  
Grenades  
Torpedoes  
Mines

#### Projectors and Dischargers

#### Ammunition and Accessories

Artillery Ammunition  
Artillery Fuzes  
Small Arms Ammunition  
Artillery Accessories  
Small Arms Accessories (Powder horns, flasks, bullet molds, tools, etc.)  
Machinegun Accessories  
Pistol and Revolver Accessories  
Devices for Manufacturing and Testing

#### Small Arms

#### Nonexplosive Missile Weapons

Polearms  
Bows and Arrows  
Other Primitive Types (Darts, Boomerangs, etc.)

#### Air Guns

#### Airplane Missiles

#### Edged and Thrusting Weapons

Knives and Daggers  
Bayonets  
Swords  
Axes and Clubs

- Vehicles, Aircraft, and Ships (including models thereof)
  - Animal Drawn Vehicles
  - Powered Combat Vehicles
  - Powered Noncombat Vehicles
  - Aircraft
  - Ships
- Specialized Military Equipment, Machines and Materials
  - Engineer
  - Signal
  - Police and Prison
  - Quartermaster
  - Chemical Warfare
  - Musical Instruments and Band Equipment
  - Medical
  - Scientific Apparatus
- Clothing and Accoutrements
  - Uniforms
    - Clothing
    - Headdress
  - Accoutrements
  - Horse Equipment
  - Armor
  - Aboriginal Dress and Accoutrements (Including religious objects, musical instruments, and household objects).
  - Insignia and Buttons
- Decorations, Trophies, Awards, and Coins
  - Decorations
  - Trophies
  - Awards
  - Coins
- Association Items
  - (Items whose primary interest lies in their close association with some historically significant person, place, thing, or event, and which cannot be filed under a regular category of military item).

- Documents
  - (Items such as commissions, certificates, diplomas, maps, posters, etc., excluding all fine arts and strictly pictorial items).

#### Colors and Flags

- Colors

- Flags

- Guidons and Markers

#### Art and Graphic Items

- Paintings (Oil and watercolor)

- Drawings (Pen and ink, pastel, crayon, etc.)

- Graphic Arts (Lithography, engraving, etc.)

- Sculpture and Miniatures

- Photographs

- Household and office furnishings (should include furniture, draperies, and other household textiles, lighting fixtures, eating utensils, china, and all items classed among the decorative arts except paintings and pictures).

- Costume Dress, Nonmilitary

*Note.* If items contained in a particular category are numerous and have significant variations, it is necessary to carry the breakdown further. For example, in the field of shoulder firearms, if numerous and varied metallic cartridge types including both rifles and carbines are present, the subordinate categories could be further broken down as follows:

#### Metallic Cartridge Type

- Single Shot Rifles

- Single Shot Carbines

- Magazine Rifles

- Magazine Carbines

- Other (Shotguns, antitank, rifles, etc.)

Each of these subordinate categories, in turn, could be subdivided alphabetically by countries of origin, i.e., US, British, French, etc.

## APPENDIX C

INSTRUCTIONS FOR COMPLETION OF HISTORICAL PROPERTY CATALOG  
(DA FORM 2609)

C-1. Information recorded on the catalog card is gathered from—

*a.* Correspondence and other documents relating to an historical property item; such as deeds of gifts, transcripts of wills, copies of bills of lading and invoices, and reports of damaged conditions.

*b.* Careful study of the item's physical characteristics.

*c.* Research.

C-2. The headings listed in *a* through *z* below are those on the Historical Property Catalog card. The type of information to be included in the catalog system is indicated:

*a. Catalog number.*

(1) Catalog numbers are assigned by and at the discretion of the curator or custodian and are preceded by an identifying symbol to be assigned by the Office of the Chief of Military History upon application of the museum or organization concerned.

(2) Catalog numbering systems are described in standard works on Museum procedures.

(3) Historical properties received in pairs or sets, such as identical chairs, a portfolio of prints, or a punchbowl and cups, should be assigned separate catalog numbers, and reference to the catalog numbers of related items recorded in the space provided on the reverse side of the catalog card. Component parts of an item, such as a messkit and cover, should be treated as one item and assigned the same number. In instances, however, where component parts are themselves complete speci-

mens, such as a sword and scabbard, or the cap, blouse, and trousers of a uniform, separate catalog numbers should be assigned, and the necessary information concerning the related items should be recorded on the catalog card.

*b. Accession number—date.* This space is for the convenience of curators and custodians who use an accession system in addition to the catalog system.

*c. Name or type of item.*

(1) Catalogers of historical properties, at their discretion, may use a classification system. In all cases, however, whether or not a classification system is used, the right half of this space will be left blank on that copy of the catalog card which is forwarded to the Office of the Chief of Military History.

(2) In the right half of the space on the copy retained for museum use, the general category and the subordinate category or categories into which the item falls may be entered. The major category is recorded on the top line. The subordinate category is recorded on the second line. Where items may require a third breakdown, as in the case of firearms, this is recorded on the third line. See figure C-1 for an illustration of the above arrangement.

*d. Source of acquisition.* Record whether the item is a gift, donation, field collection, exchange, loan, etc.

*e. Date of acquisition.* Record the date on which the item was received.

*f. Title vested with.* Record the official designation of the museum or the name of the owner.

*g. Name and address of donor.* Record the full name and address of the donor of the item. A donor's professional title or military rank, if any, should be included.

*h. Conditions of donation.* Where one or more conditions are attached to the gift or donation of an item, such information will be specified in this space. In this connection, attention is invited to paragraph 10-8a.

*i. Location.* Record in pencil, the room, case, drawer, or shelf where the item is stored or exhibited. This record should be revised whenever the item is moved.

*j. Material.* If the material(s) of which major components of the item are composed constitute a distinguishing characteristic of the item, such material(s) should be recorded as specifically as possible, e.g., oil or linen, canvas, brass, glazed earthenware.

*k. Color.* If one or several dominant colors constitute a distinguishing characteristic of the item, they should be recorded.

*l. Size (length, width, height).*

(1) Always record exact measurements in feet and inches. Measurements always are maximum unless noted otherwise. The total assembled measurements are given for objects which have separate parts, such as a messkit and cover. Separate measurements of component parts may be recorded at the discretion of the curator.

(2) According to the nature and shape of the item, measurements may include any of the following dimensions: length, width, height, depth, thickness, diameter. Once the various dimensions of an item are given, they always should be repeated in the same order.

(3) If part of an item is missing, it should be specified that the given measurements are incomplete.

*m. Weight.* Always record weight in pounds and ounces.

*n. Country of origin.* Record the origin of the item, by country and also, where possible, by locality.

*o. Period or date of manufacture.* Record

either the period, e.g., mid-17th century; circa 1820; or 1879-84; or, where known, the date of manufacture, e.g., 1963; or 21 May 1944.

*p. Artist or maker.* Record name of the artist or maker (either individual or firm, as applicable), using full name if known.

*q. Location—Signature or maker's mark.* Record the location of the artist's or maker's signature or mark.

*r. Physical description.*

(1) Record distinguishing characteristics not already noted in spaces listed above. Characteristics such as style, shape, and design details, should be noted. Features which are common to a species, however, need not be described.

(2) Record proof marks, hallmarks, field numbers, previous owner's catalog numbers, old labels, and other special markings and note their location on the item. Rubbings of proof marks and hallmarks on important items should be placed in the catalog folder. Describe watermarks in paper. Copy any inscription, dedication or otherwise, and translate it into English if in a foreign language (the translator's name should be recorded). If additional space is required use the "Remarks" section on the reverse side of the card.

*s. Physical condition.*

(1) Record whether the item is in good, fair, or bad condition. Note missing parts, scratches, abrasions, chips, tears, repairs, refinishing, etc.

(2) The following criteria adopted by the National Rifle Association of America will be used in describing condition of firearms.

(a) Factory new—All original parts; 100 percent original finish; in perfect condition in every respect, inside and out.

(b) Excellent—All original parts; over 80 percent original finish; sharp lettering, numerals, and design on metal and wood; unmarred wood; fine bore.

(c) Fine—All original parts; over 30 percent original finish; sharp lettering, numerals, and design on metal and wood; minor marks in wood; good bore.

(d) Very good—All original parts; none to 30 percent original finish; original metal surfaces smooth with all edges sharp; clear lettering, numerals, and design on metal; wood slightly scratched or bruised; bore disregarded for collection purposes.

(e) Good—Some minor replacement parts; metal smoothly or lightly pitted in places, cleaned, or reblued; principal lettering, numerals, and design on metal legible; wood refinished, scratched, bruised, or minor cracks repaired; in good working order.

(f) Fair—Some major parts replaced; minor replacement parts may be required; metal rusted, may be lightly pitted all over, vigorously cleaned, or reblued; rounded edges of metal and wood; principal lettering, numerals, and design on metal partly obliterated; wood scratched, bruised, cracked, or repaired where broken; in fair working order or can be easily repaired and placed in working order.

(g) Poor—Major and minor parts replaced; major replacement parts required and extensive restoration needed; metal deeply pitted; principal lettering, numerals, and design obliterated; wood badly scratched, bruised, cracked, or broken; mechanically inoperative; generally undesirable as a collection piece.

*t. Monetary value.* Whenever possible, the appraised value of an item which has actual monetary value should be recorded. When such valuations are not available, the curator or custodian may assign a reasonable monetary value for accountability purposes.

*u. Photo negative number.* This space is intended for negative numbers of photographs of historical properties.

*v. History and significance.* Although the detailed history of the item may be kept in a historical property jacket with field notes, correspondence, and special reports, there should be recorded in this space brief information concerning where the item was collected, in

what collections it previously had been, in what special exhibitions it has been shown, what preservative treatment it had received, and reference to published information concerning it. The source of information concerning an item's association with historically significant persons, places, or events should be recorded in order that all such claims can be traced and evaluated.

*w. Loaned to or borrowed from.* Record in pencil, the official designation or name, and the address of an agency, installation, museum, organization, or individual to or from which the item is on loan.

*x. Catalog numbers or related items.* Record the catalog numbers of other component parts of the item when such parts are of themselves complete specimens, as noted in *a* above.

*y. Remarks.*

(1) Record here other pertinent information concerning the item. Always enter the name of the cataloger and the date on which the item is cataloged. If a curator or custodian makes out the catalog card in rough draft for someone else to type, his name rather than that of the typist is entered.

(2) Where an expert has made an authoritative identification of the item, record his name and the date on which the identification was made. If the cataloger makes the identification, the fact need not be recorded. If there are successive determinations with changes or refinements in the identification, the details can be noted in the historical property jacket and a reference noted on the catalog card. The name of any professional appraiser who has placed a value on the item should be noted, with the date of appraisal.

*z. Dates of maintenance inspections.* Enter here the initials of the inspector as well as dates of maintenance inspections.

C-3. Sample entries are shown in figure C-1.

HISTORICAL PROPERTY CATALOG		
For use of this form, see AR 870-5; the proponent agency is the Office of the Chief of Military History.		
CATALOG NUMBER 2CAV-48	NAME OR TYPE OF ITEM <u>Shoulder Firearms</u> <u>Metallic Cartridge Types</u> <u>Single Shot Carbines</u> <u>U.S.</u>	
ACCESSION NO.      DATE	U.S. Carbine, Model 1873	
SOURCE OF ACQUISITION Donation	DATE OF ACQUISITION 17 May 1957	TITLE VESTED WITH HQ, 2d Armored Cavalry
NAME AND ADDRESS OF DONOR (Include ZIP Code) Mrs T. L. Martin, 334 Margie Ave, Fargo, N.Dak 52041		CONDITIONS OF DONATION
LOCATION Case 3 (in pencil)	MATERIAL	COLOR
SIZE (Length, Width, Height) 3'x8"x5-7/8"x2-3/4"	WEIGHT 6 lb. 7 oz.	COUNTRY OF ORIGIN U.S., Springfield, Mass.
PERIOD OR DATE OF MANUFACTURE 1873-79	ARTIST OR MAKER Springfield Armory	LOCATION - SIGNATURE OR MAKERS MARK Lockplate
PHYSICAL DESCRIPTION .45 cal. Lockplate stamped with eagle and "U.S./SPRINGFIELD/1873." Breechblock stamped "MODEL/1873/(device, indistinguishable)/U.S." Receiver stamped "39702." Buttplate, rear sight leaf slide, and swivel ring missing. Stock cracked through at wrist; old repair consisting of rawhide wrapping.		
PHYSICAL CONDITION Fair	MONETARY VALUE \$190.00	PHOTO NEGATIVE NUMBER 243
HISTORY AND SIGNIFICANCE Donated by Mrs. Martin in memory of her father, Matthew Ryan, Sgt, Co H, 2d Cav, 1875-85. Acquired by Sgt Ryan in 1894 at Sheridan, Wyo., from a Cheyenne Indian, Two Bears, who claimed to have captured item at Battle of the Little Bighorn, 1876. See (2CAV-49) affidavit of Sgt Ryan for detailed history of item.		

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Figure C-1.

LOANED TO OR BORROWED FROM	CATALOG NUMBERS OF RELATED ITEMS	
	2CAV-49	
REMARKS	DATES OF MAINTENANCE INSPECTIONS	
Cataloged by SFC Elmer L. Gwynne, 14 Apr 63	8 Aug 63	
(History & Significance--cont.) Included in Special exhibit at Custer Battlefield Nat'l Monument, Crow Agency, Mont., 1951-52. For notes concerning and photo of item see John E. Parsons & John S. duMont, <u>Firearms in the Custer Battle</u> (Harrisburg, Pa., 1953), pp. 59, 61.		
All metal parts cleaned and waxed, Nov. 1962		

Figure C-1--Continued.

The proponent agency of this regulation is the Office of the Chief of Military History. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications) direct to the Chief of Military History, ATTN: MH-PP&A, Department of the Army, Washington, DC 20315.

By Order of the Secretary of the Army:

Official:

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The Adjutant General.*

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